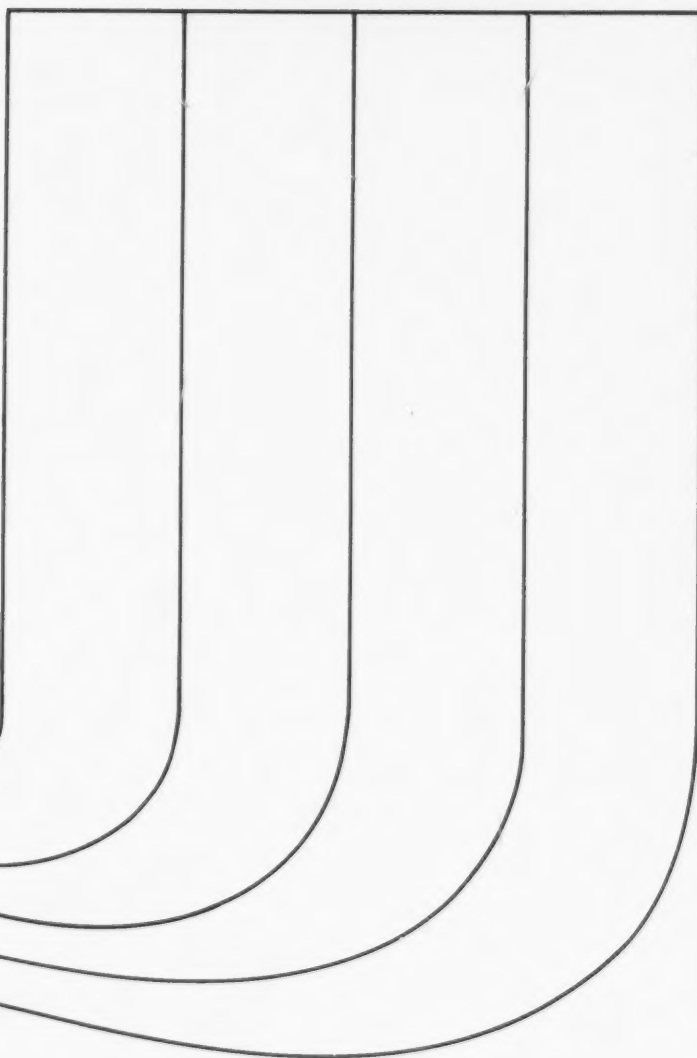
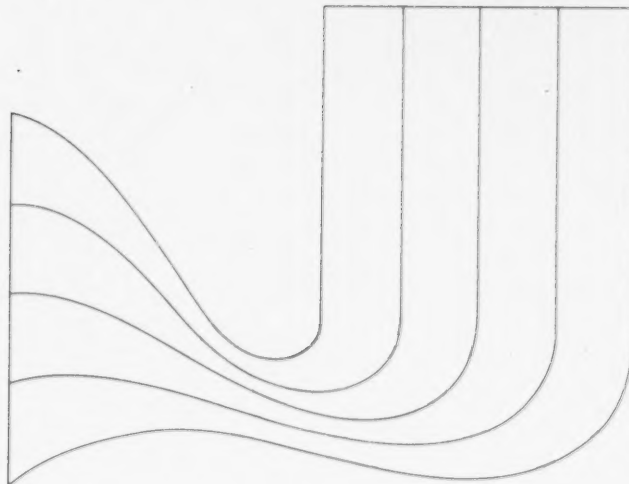


1979 MOTORCYCLE STATISTICAL ANNUAL



MOTORCYCLE INDUSTRY COUNCIL, INC.

1979
MOTORCYCLE
STATISTICAL
ANNUAL



Published by



MOTORCYCLE INDUSTRY COUNCIL, INC.

ADMINISTRATIVE OFFICE
4100 Birch Street, Suite 101
Newport Beach, California 92660
(714) 752-7833 Telex 67-8302

GOVERNMENT RELATIONS OFFICE
1001 Connecticut Avenue, Suite 522
Washington, D.C. 20036
(202) 872-1381 Telex 89-508

Compiled and edited by the
Motorcycle Industry Council, Inc.
Research & Statistics Department
Under the direction of Pamela Amette
4100 Birch Street, Suite 101
Newport Beach, California 92660

The cooperation of the many contributors to this annual is gratefully acknowledged. The source note below each table credits the various government and private organizations which have provided information for the Statistical Annual.

Additional copies may be obtained for \$5.00 from the MIC Administrative or Government Relations Office.



MOTORCYCLE INDUSTRY COUNCIL, INC.

The motorcycle industry has experienced dramatic growth in the last twelve years. Since 1965 motorcycles registered for use on public roads have grown nearly four-fold. Today it is estimated that 7.3 million motorcycles are used by 18.3 million people in the U.S.

With this new growth, the motorcycle has emerged as a transportation and recreation vehicle of broad public interest. In recent years the motorcycle industry has been working closely with the state and federal government to meet the challenge of protecting the concerns of the riders, the public, and the natural environment.

Although motorcycles contribute less than 1 percent of the total hydrocarbon emissions nationwide, the motorcycle industry supported the adoption of uniform national standards to regulate exhaust emissions. As a result, beginning in 1978 all new motorcycles sold for use on public roads comply with federal exhaust emission standards, following 4 years of technical research and product modifications.

The motorcycle industry's continuing commitment to reduce sound levels in our environment has been demonstrated by the production of quieter motorcycles and aftermarket exhaust systems with each year. The U.S. Environmental Protection Agency has proposed motorcycle noise regulations which would affect motorcycles manufactured after 1981. The MIC supports the concept of uniform, national motorcycle noise standards and has offered constructive comments to assist the EPA in the development of uniform, enforceable and cost-effective regulations.

The use of motorcycles for off-highway recreation has grown significantly in the past ten years. The motorcycle industry and responsible riders understand that indiscriminate vehicle use can damage certain fragile environments and that uncontrolled vehicle use in some areas can infringe on the rights of other land users. The industry has been working with state and federal government agencies to encourage intelligent land planning and management based on equitable multiple use which can benefit all outdoorsmen, including the 12 million off-highway motorcycle recreationists.

The motorcycle industry is also deeply concerned with reducing motorcycle accidents and injuries. This is being accomplished through the development and implementation of motorcycle rider education and licensing improvement programs, and through safety research and public information programs.

The past few years have been particularly challenging for the motorcycle industry. The industry was compelled to meet the environmental and consumer demands at a time when the economic recession and inflation were at its worst. In spite of these difficult times, the years following the recession have shown a strong rebound in motorcycle sales, which supports the belief that the industry will continue to grow as well as achieve goals in environmental protection and highway safety.

Each year the MIC receives countless inquiries for statistical data and trends within the motorcycle industry. The information in this publication has been gathered to provide a comprehensive, orderly and accurate source of motorcycle statistics in response to those numerous requests.

It is our intention to update the Motorcycle Statistical Annual each year. We welcome your comments for future editions.

CONTENTS

	Page
The Motorcycle Market	3-15
U.S. Motorcycle Population by Model Type, Engine Displacement, Year	4
U.S. Motorcycle Population, Model Type by Engine Displacement	5
U.S. Motorcycle Population and Penetration by Region and State	6
Total Motorcycle Registrations by Year	7
Total Motorcycle Registrations by State	8
Economic Value of the Motorcycle Retail Marketplace by State	9
New Motorcycle Sales Summary	10
U.S. Motorcycle Imports by Year, Country, Engine Displacement	11
New Motorcycle Wholesale Sales by Major Brands	12
New Motorcycle Registrations by State	13
New Motorcycle Registrations by Leading Brands	14
Manufacturers and Distributors	15-20
Profile of Major U.S. Motorcycle Manufacturers and Distributors	16
Other U.S. Motorcycle Manufacturers and Distributors	17-18
The Motorcycle Aftermarket	19-22
Years in Business, Number of Employees, and Motorcycle Related Sales	20
Aftermarket Retail Outlets and Other Industries Served	21
Top Selling Aftermarket Products, Financing of Aftermarket Sales	22
The Retail Marketplace	23-26
Motorcycle Retail Outlets by State	24
Motorcycle Dealer Profile and Estimated Dollar Volume	25
Distribution of Dealer Sales, Customer and Flooring Financing	26
Motorcycle Usage	27
U.S. Motorcycle Usage On and Off-Highway by State	28
Motorcycle Street Usage, Commuting and Other Purposes	29
Public Land and Off-Highway Motorcycle Statistics by State	30
Motorcycle Miles Traveled, On and Off-Highway Mileage by Model Type	31
Motorcycle Miles Traveled, Model Type by On and Off-Highway Mileage	32
Average Annual Motorcycle Mileage	33
Motorcycle Scrapage and Operability Rate	34
Operating and Ownership Costs of the Motorcycle and Automobile	35
Motorcycle Accident Statistics by State	36
Motorcycle Rider Education Programs	37
State Motorcycle Operator Licensing Procedures	38
State Motorcycle Operator Licensing Statistics	39
State Motorcycle Equipment Requirements	40
The Motorcycle Owner	42-43
Number of Owners/Riders, Sex, Marital Status, Age, Education	42
Owner Occupation, Income, Motorcycle Ownership	43
Index	44



Photo Courtesy of Motorcycle Dealernews

THE MOTORCYCLE MARKET

U.S. MOTORCYCLE POPULATION By MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

In 1978 there were an estimated 7.3 million motorcycles in use in the United States, compared to an estimated 7.9 million in 1977. This slight decline in the motorcycle population is attributed to fewer sales of new motorcycles in recent years and the higher scrappage rate of motorcycles sold during the peak in annual sales, 1971 to 1973.

Of the total motorcycle population in 1978, 45.6% were *on-highway* motorcycles, 24.3% were *off-highway* motorcycles, and 30.1% were *dual purpose* motorcycles. Both the on-highway and off-highway segments increased as a portion of the market in 1978 compared to 1977, while the dual purpose segment decreased considerably.

Of all motorcycles in use, it is estimated that almost six in every ten (56.7%) have an engine displacement less than 350 cubic centimeters. Two thirds of the estimated motorcycle population were purchased new during the last five years.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

	1978		1977	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type				
On-Highway	3,326,600	45.6%	3,518,400	44.4%
Off-Highway	1,776,600	24.3%	1,754,000	22.1%
Dual Purpose	2,201,800	30.1%	2,653,200	33.5%
	7,305,000	100.0%	7,925,600	100.0%
Engine Displacement				
Under 125 cc	2,164,000	29.6%	2,364,500	29.8%
125-349 cc	1,983,600	27.2%	2,243,400	28.3%
350-449 cc	1,206,200	16.5%	1,390,800	17.5%
450-749 cc	851,700	11.6%	892,400	11.3%
Over 749 cc	1,099,500	15.1%	1,034,500	13.1%
	7,305,000	100.0%	7,925,600	100.0%
Year Sold New				
1978	975,000	13.3%	—	—
1977	1,058,000	14.5%	1,080,000	13.6%
1976	1,008,000	13.8%	1,029,500	13.0%
1975	846,000	11.6%	902,200	11.4%
1974	900,000	12.3%	1,080,300	13.6%
1973	836,000	11.4%	1,140,600	14.5%
1972	503,000	6.9%	748,400	9.4%
1971	322,000	4.4%	458,600	5.8%
1970	172,000	2.4%	262,500	3.3%
1969	67,000	.9%	113,900	1.4%
Prior to 1969	618,000	8.5%	1,109,600	14.0%
	7,305,000	100.0%	7,925,600	100.0%

Model Type Definitions: **On-Highway** motorcycles are those certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards, and designed primarily for use on public roads. **Off-Highway** motorcycles are those which are not certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards. **Dual Purpose** motorcycles are certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards, and designed with the capability for use on public roads as well as off-highway recreational use. Mopeds (motorized bicycles) are not included in 1977 and 1978 motorcycle population estimates.

Source: 1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

On-highway motorcycles tend to have relatively large engines. In 1978, 83.3% of the on-highway motorcycles in use had an engine displacement of 350 cc's or greater. The recent trend within the on-highway segment has shown an increase in the big bike or touring market, motorcycles with engines greater than 749 cc's. In fact, this displacement category continued to grow in volume in 1978, while the other segments of the on-highway population decreased slightly.

The off-highway segment, which also grew in 1978, is dominated by small engine motorcycles. Nearly two thirds (63.1%) of the off-road motorcycles in use had an engine displacement less than 125 cc's.

The dual purpose segment continued to decline, primarily due to the discontinuation of models not in compliance with emission regulations. In 1978 the majority (88.3%) of the dual purpose motorcycles had engines within the small cc range, under 125 cc's, or medium range, 125 to 349 cc's.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE BY ENGINE DISPLACEMENT

Model Type	1978		1977	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
On-Highway	3,326,600	100.0%	3,518,400	100.0%
Under 125 cc	228,300	6.9%	250,300	7.1%
125-349 cc	325,200	9.8%	382,800	10.9%
350-449 cc	882,900	26.5%	1,017,300	28.9%
450-749 cc	791,000	23.8%	833,700	23.7%
Over 749 cc	1,099,200	33.0%	1,034,300	29.4%
Off-Highway	1,776,600	100.0%	1,754,000	100.0%
Under 125 cc	1,120,800	63.1%	1,109,700	63.3%
125-349 cc	531,200	29.9%	519,900	29.6%
350-449 cc	93,300	5.3%	93,200	5.3%
450-749 cc	31,000	1.7%	31,000	1.8%
Over 749 cc	300	*	200	*
Dual Purpose	2,201,800	100.0%	2,653,200	100.0%
Under 125 cc	814,900	37.0%	1,004,500	37.9%
125-349 cc	1,127,200	51.3%	1,340,700	50.5%
350-449 cc	230,000	10.4%	280,200	10.6%
450-749 cc	29,700	1.3%	27,800	1.0%
Over 749 cc	—	—	—	—

* Less than .05%

NOTE: See page 4 for model type definitions.

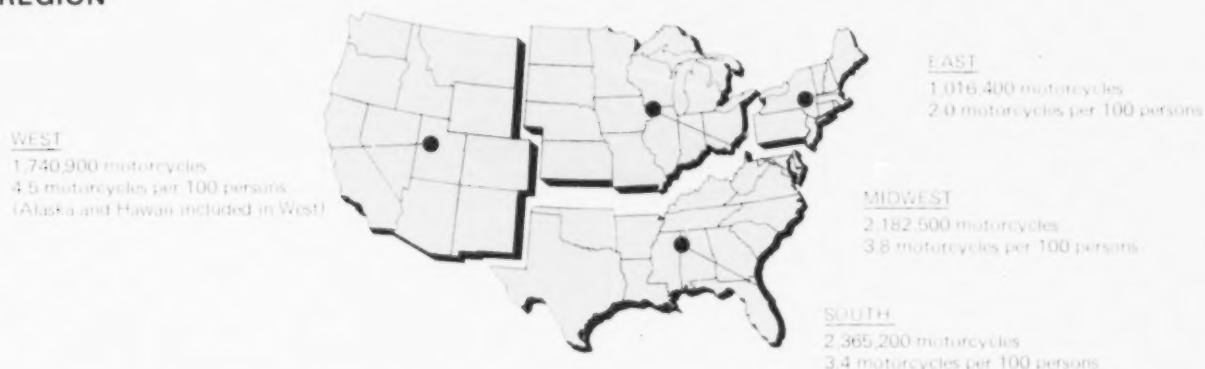
U.S. MOTORCYCLE POPULATION AND PENETRATION By REGION AND STATE

On a regional basis, the greatest number of motorcycles in use in 1978 were estimated to be in the South and the Midwest. Although the West ranked third in motorcycle population, California was, by far, the nation's leading state, where nearly one in every eight (11.8%) of the nation's motorcycles were owned.

In 1978 there were an estimated 3.4 motorcycles owned for every 100 persons living in the United States. Regionally, motorcycle penetration was highest in the West where 4.5 motorcycles were owned for every 100 residents, and lowest in the East where 2.0 motorcycles were owned for every 100 residents.

Nearly one third (31.8%) of the nation's motorcycle population was owned in the five leading states, California, Texas, Michigan, Ohio, and Pennsylvania.

1978 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION



1978 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENTRATION BY STATE

State	Motorcycle Population	Motorcycle Population by Model Type			Motorcycle Penetration Per 100 Population
		On-Hwy.	Off-Hwy.	Dual Purpose	
Alabama	135,400	58,000	32,900	44,500	3.6
Alaska	27,300	6,800	8,300	12,200	6.5
Arizona	98,400	39,200	28,600	30,600	4.2
Arkansas	82,600	28,500	23,400	30,700	3.8
Calif.	862,500	369,100	268,300	225,100	3.9
Colorado	119,800	48,100	26,600	45,100	4.5
Conn.	67,500	38,300	11,500	17,700	2.2
Delaware	16,500	7,900	4,300	4,300	2.8
D.C.	3,800	2,700	300	800	.5
Florida	253,000	125,200	56,300	71,500	2.9
Georgia	190,800	78,500	50,500	61,800	3.8
Hawaii	Not Available				
Idaho	57,800	15,600	20,200	22,000	6.6
Illinois	312,900	166,800	62,700	83,400	2.8
Indiana	231,800	125,700	49,300	56,800	4.3
Iowa	172,300	87,100	32,400	52,800	5.9
Kansas	102,500	46,700	19,900	35,900	4.4
Kentucky	101,700	42,000	30,100	29,600	2.9
La.	153,200	57,800	56,700	38,700	3.9
Maine	39,600	23,100	5,800	10,700	3.6
Maryland	100,900	53,600	22,800	24,500	2.4
Mass.	100,400	56,400	18,600	25,400	1.7
Michigan	371,500	173,500	78,900	119,100	4.1
Minn.	164,100	78,300	32,600	53,200	4.1
Miss.	75,200	28,000	23,600	23,600	3.1
Missouri	158,400	71,400	37,500	49,500	3.3
Montana	55,700	14,500	14,800	26,400	7.2
Nebraska	81,900	35,100	18,300	28,500	5.2
Nevada	30,400	10,600	10,500	9,300	4.7
N.H.	44,000	26,800	6,000	11,200	5.2
N.J.	135,700	71,400	29,100	35,200	1.8
New Mex.	50,100	19,000	12,000	19,100	4.1
New York	270,900	165,100	48,300	57,500	1.5
N.C.	191,000	88,600	46,700	55,700	3.4
N.D.	40,000	14,800	9,100	16,100	6.1
Ohio	333,200	180,400	71,800	81,000	3.1
Oklahoma	129,300	54,700	27,300	47,300	4.6
Oregon	130,000	40,600	44,600	44,800	5.4
Penn.	316,400	146,000	63,400	107,000	2.7
R.I.	22,700	12,700	3,900	6,100	2.4
S.C.	73,600	33,800	18,400	21,400	2.5
S.D.	37,500	14,800	9,000	13,700	5.3
Tenn.	192,100	83,500	49,000	59,600	4.5
Texas	436,400	180,900	111,600	143,900	3.4
Utah	80,200	20,300	21,100	38,800	6.3
Vermont	19,200	10,600	3,100	5,500	4.0
Virginia	147,100	73,300	32,200	41,600	2.9
Wash.	201,800	68,300	65,500	68,000	5.5
West Va.	82,600	27,100	22,200	33,300	4.4
Wisc.	176,400	98,700	28,700	49,000	3.8
Wyoming	26,900	6,700	7,900	12,300	6.5
U.S. Totals	7,305,000	3,326,600	1,776,600	2,201,800	3.4

* See page 4 for model type definitions.

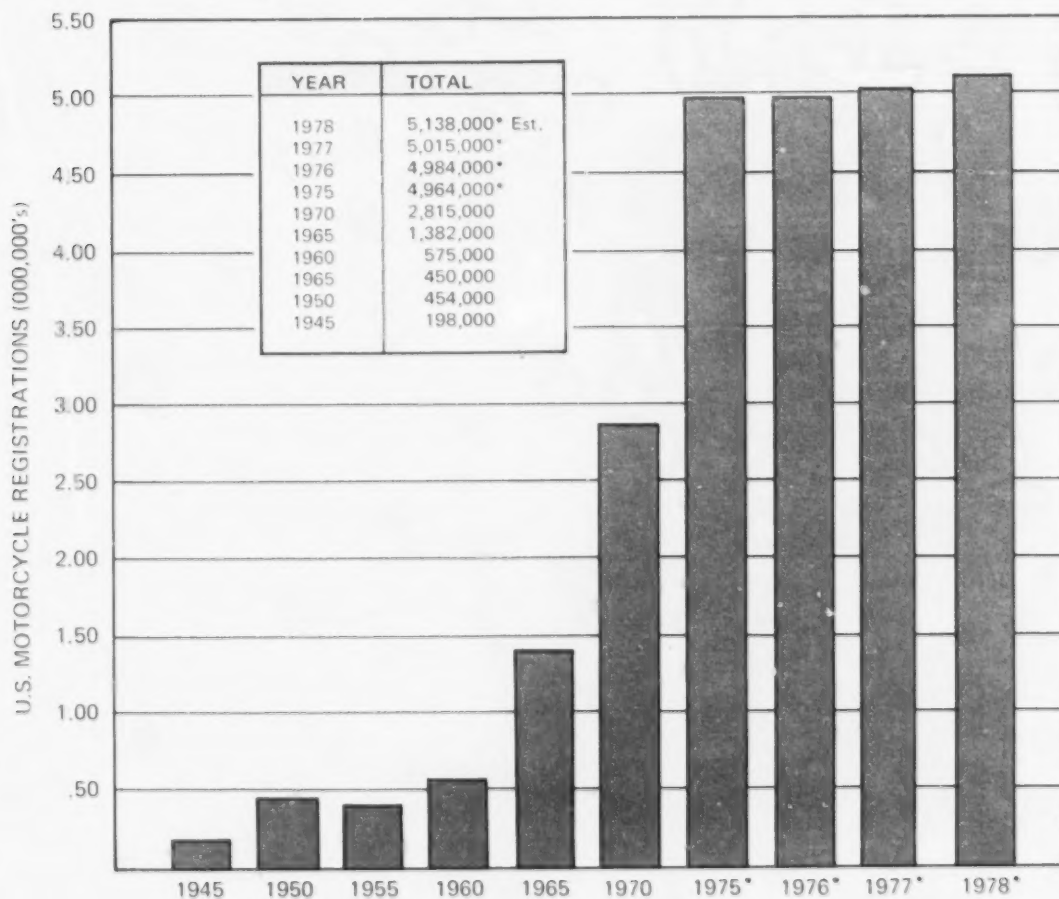
Source: 1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.
1978 Survey of Buying Power, Sales & Marketing Management, New York, New York, July 1978.

TOTAL MOTORCYCLE REGISTRATIONS By YEAR

Of the 7.3 million motorcycles in use in the United States, an estimated 5.1 million, or 70% were registered for use on public roads in 1978. In order to be registered for use on public roads, motorcycles must be in compliance with the Federal Motor Vehicle Safety Standards and the state motorcycle equipment requirements. The equipment requirements for street registered motorcycles are summarized on page 40.

The motorcycle industry has experienced phenomenal growth in the last twenty years. Since 1955 motorcycle registrations have increased tenfold, while automobile registrations have only doubled.

U.S. TOTAL MOTORCYCLE REGISTRATIONS 1945-1978



*Total U.S. and several state registration figures for recent years may be inflated due to the implementation of staggered registration renewal systems and off-highway vehicle registration reporting systems, and the reporting of dual registration and titling transactions. No accurate revisions are available at this time.

TOTAL MOTORCYCLE REGISTRATIONS By STATE

In 1978 motorcycle registrations accounted for 3.3% of all motor vehicles registered for use on public roads in the United States.

Regionally, the greatest number of motorcycle registrations occurred in the Midwest, where 77% of the motorcycle population was registered for use on public roads. The South, which was estimated to have the greatest number of motorcycles in use regionally, had the lowest percentage (58%) of motorcycles registered for street use.

The five leading states, California, Texas, Ohio, Michigan, and Illinois, accounted for one third of the estimated 5.1 million motorcycles registered in 1978.

U.S. TOTAL MOTORCYCLE REGISTRATIONS BY STATE 1969-1978

STATE	1969	1970	1971	1972	1973	1974*	1975*	1976*	1977*	1978*Est.
Alabama	33,207	43,062	51,934	58,682	75,465	78,059	74,513	63,072	71,710	70,000
Alaska	6,376	8,535	9,639	10,843	11,306	11,760	12,639	13,292	13,290	14,000
Arizona	27,699	34,335	42,886	49,177	56,700	65,018	67,843	60,278	65,143	63,000
Arkansas	18,530	22,030	23,795	29,853	39,235	44,955	36,954	33,096	31,351	29,000
California	476,191	567,840	614,637	625,783	638,776	672,121	668,460	667,363	678,538	683,000
Colorado	34,834	44,744	57,007	68,818	81,740	92,725	95,315	95,787	105,819	110,000
Conn.	23,656	29,540	43,025	49,084	58,272	65,346	65,345	69,966	70,049	72,000
Delaware	3,799	4,861	5,970	5,144	6,053	7,451	7,647	7,153	8,137	8,000
Florida	75,743	98,688	122,020	133,489	151,959	187,540	164,982	180,998	181,113	184,000
Georgia	42,091	52,180	65,988	70,378	90,933	104,600	98,095	93,546	98,188	97,000
Hawaii	8,579	10,834	10,033	10,612	10,225	9,940	5,962	6,214	6,299	7,000
Idaho	23,973	26,876	32,027	35,941	43,295	46,237	44,428	43,134	44,650	47,000
Illinois	102,527	116,947	135,492	142,441	177,834	207,840	218,073	227,391	238,645	249,000
Indiana	71,705	71,205	88,920	92,674	102,284	145,033	142,427	140,741	153,154	156,000
Iowa	48,293	60,835	79,065	97,505	118,715	138,201	149,357	151,829	160,124	170,000
Kansas	39,835	53,847	74,525	88,894	99,399	92,354	90,329	86,789	83,814	83,000
Kentucky	24,294	26,334	29,597	36,721	49,353	58,034	61,027	59,351	61,405	62,000
Louisiana	25,063	30,190	34,035	37,083	44,686	59,722	53,541	57,832	68,966	72,000
Maine	7,770	9,973	12,683	16,146	20,441	25,832	27,095	27,584	31,608	35,000
Maryland	21,973	27,060	34,755	39,154	47,274	65,077	64,707	66,298	69,191	69,000
Mass.	33,400	44,918	52,707	55,887	68,690	82,881	81,249	72,614	86,240	88,000
Michigan	131,829	160,387	193,984	225,591	268,754	299,834	291,722	267,306	261,090	258,000
Minn.	61,707	72,447	89,226	103,764	121,490	139,304	137,995	151,270	149,008	154,000
Miss.	13,915	16,662	20,351	25,487	31,824	34,618	30,911	28,413	27,986	27,000
Missouri	30,618	50,234	67,755	80,736	95,314	108,869	101,968	96,201	95,099	92,000
Montana	19,676	24,765	29,958	34,678	36,856	39,692	39,225	38,580	46,784	50,000
Nebraska	24,472	32,853	38,480	40,149	42,834	49,209	50,130	52,383	50,446	51,000
Nevada	15,786	18,480	19,306	16,095	15,674	17,147	17,750	18,260	19,961	22,000
N.H.	7,176	9,537	12,673	15,672	21,468	27,145	27,121	25,957	27,852	37,000
New Jersey	36,420	47,637	57,352	65,228	70,605	84,621	83,531	86,753	91,087	95,000
New Mexico	18,590	21,839	27,437	29,787	31,217	33,622	35,263	37,699	38,885	42,000
New York	85,178	86,306	77,742	80,405	89,624	107,598	112,885	120,695	132,376	142,000
N.C.	37,453	47,841	60,368	76,171	95,917	117,515	111,551	105,633	104,216	106,000
N.D.	10,023	11,327	13,318	15,782	18,780	22,429	24,782	24,627	26,063	27,000
Ohio	112,082	129,230	152,088	179,835	225,610	238,087	232,390	254,482	253,686	259,000
Oklahoma	42,108	56,249	71,171	84,674	94,304	104,221	107,671	109,621	110,035	114,000
Oregon	45,414	59,035	69,769	73,566	95,563	71,817	73,268	83,821	84,822	90,000
Penn.	110,306	115,356	147,395	176,130	223,156	281,157	339,437	361,918	231,742	245,000
R.I.	7,957	10,903	13,231	15,190	17,939	20,085	20,152	19,919	24,892	27,000
S.C.	14,028	17,303	19,053	26,079	39,888	56,706	40,926	45,801	41,293	42,000
S.D.	10,823	11,995	13,897	16,624	19,758	23,019	24,041	25,127	26,636	30,000
Tenn.	35,332	45,450	57,698	70,283	79,148	98,178	95,723	85,763	86,653	84,000
Texas	110,416	144,624	186,183	218,195	242,966	279,475	273,863	270,089	285,735	290,000
Utah	20,518	29,172	37,782	45,700	46,974	52,065	51,068	50,357	53,168	55,000
Vermont	6,236	7,259	8,991	9,209	10,332	13,435	13,859	14,681	16,862	19,000
Virginia	24,622	32,566	40,984	52,729	70,362	89,978	91,151	72,302	75,688	74,000
Washington	49,651	62,284	74,703	81,315	91,849	110,162	110,211	111,825	115,441	117,000
West Va.	22,726	39,191	46,984	49,972	56,183	60,201	60,404	54,062	56,429	57,000
Wisconsin	49,165	54,415	60,122	70,277	83,631	104,898	115,571	125,161	133,173	143,000
Wyoming	8,418	10,550	12,478	13,887	15,029	16,245	15,732	17,288	16,051	17,000
D.C.	3,525	4,067	3,960	4,112	4,586	4,341	3,781	3,922	3,971	4,000
TOTAL	2,315,708	2,814,798	3,345,179	3,754,631	4,350,270	4,966,399*	4,964,070*	4,984,164*	5,014,564*	5,138,000*

* Total U.S. and several state registrations figures for recent years may be inflated due to the implementation of staggered registration renewal systems and off-highway vehicle registration reporting systems, and the reporting of dual registration and titling transactions. No accurate revisions are available at this time.

Source: U.S. Department of Transportation, Federal Highway Administration.

ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE By STATE

In 1978 the motorcycle industry generated an estimated \$6.1 billion in consumer sales and services and state taxes and licensing, of which \$1.5 billion, or 24%, is attributed to retail sales of new motorcycles.

In addition to this \$6.1 billion generated by the retail marketplace, major contributions to the economic value of the industry in personnel salaries, product advertising, corporate and personal income taxes, etc., are made by the manufacturers and distributors of new motorcycles, parts and accessories, and the trades allied to the industry.

1978 ESTIMATED ANNUAL ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

State	1978 Estimated Annual* Economic Value of the Retail Marketplace	1978 Estimated Retail Sales of New Motorcycles		State	1978 Estimated Annual* Economic Value of the Retail Marketplace	1978 Estimated Retail Sales of New Motorcycles	
		\$ 000's	Units			\$ 000's	Units
Alabama	\$ 83,300		16,700	Montana	\$ 47,000		8,200
Alaska	18,500		3,900	Nebraska	72,700		11,400
Arizona	89,300		14,400	Nevada	33,100		5,200
Arkansas	48,700		10,400	New Hamp.	42,700		5,800
California	747,500		119,600	New Jersey	120,200		17,200
Colorado	122,000		17,600	New Mexico	51,800		8,600
Connecticut	70,000		9,700	New York	291,300		40,000
Delaware	11,400		1,800	No. Carolina	112,400		18,200
Dist. of Col.	2,200		100	No. Dakota	35,000		6,000
Florida	195,000		31,500	Ohio	293,200		41,800
Georgia	131,200		24,800	Oklahoma	116,100		19,800
Hawaii	Not Avail.		Not Avail.	Oregon	93,200		16,600
Idaho	51,200		9,100	Pennsylvania	232,500		35,200
Illinois	300,700		42,200	Rhode Island	22,400		3,300
Indiana	210,900		31,600	So. Carolina	37,900		8,000
Iowa	156,600		30,400	So. Dakota	31,800		5,500
Kansas	75,300		11,800	Tennessee	122,900		22,600
Kentucky	84,200		15,300	Texas	365,500		62,700
Louisiana	127,900		26,500	Utah	67,100		12,000
Maine	37,500		5,900	Vermont	17,300		2,600
Maryland	84,000		12,300	Virginia	106,400		16,800
Massachusetts	90,500		12,100	Washington	171,900		27,800
Michigan	260,800		39,700	West Virginia	47,200		8,900
Minnesota	156,500		23,000	Wisconsin	176,300		25,800
Mississippi	53,500		11,500	Wyoming	25,800		4,600
Missouri	117,600		18,500	U.S. Total	\$6 060,000		975,000
							\$1,454,500

THE MOTORCYCLE MARKET

*The estimated annual economic value of the retail marketplace includes retail sales of motorcycles (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registrations fees. Revenues from industry publications, corporate income taxes, personal income tax from non-dealer salaries, motorcycle and aftermarket manufacturer and distributor personnel salaries and advertising, and special events attendance are not included.

NOTE: The revised 1977 "Estimated Annual Economic Value of the Motorcycle Retail Marketplace" is \$5,079,000,000 and the revised 1977 "Estimated Retail Sales of New Motorcycles" is \$1,422,000,000. 1977 revisions by state are available from the MIC, Newport Beach office.

Source: "1978 Estimated Retail Sales of New Motorcycles" for each state was derived by the Motorcycle Industry Council from the MIC Manufacturers Shipment Reporting System by adjusting wholesales units and their estimated retail dollar value to include sales by nonparticipating manufacturers. "1978 Estimated Annual Economic Value of the Motorcycle Retail Marketplace" was derived by the Motorcycle Industry Council for each state by using as a determinant the percent of the annual motorcycle industry economic value represented by the estimated retail sales dollars for new motorcycles in a sample of states.

NEW MOTORCYCLE SALES SUMMARY: IMPORTS, WHOLESALE AND RETAIL SALES, AND INVENTORIES

In 1978 935,000 motorcycles were imported, primarily from Japan, and an estimated 80,000 units were manufactured domestically. 1978 estimated wholesale sales to dealers of new motorcycles were one million units and estimated retail sales were 975,000 units. Although retail sales units of new motorcycles declined in 1978 compared to 1977, the retail dollar volume increased slightly as sales of the larger displacement, higher priced motorcycles continued to grow. U.S. manufacturer and distributor warehouse inventories of new motorcycles are estimated to be about 365,000 units, and new motorcycle unit inventories for the nation's 7,300 franchised dealers are estimated to be about 310,000 units.

NEW MOTORCYCLE UNIT SALES SUMMARY, 1969-1978 IMPORTS, U.S. PRODUCTION, WHOLESALE AND RETAIL SALES, AND INVENTORIES

Year	U.S. Motorcycle Imports ¹ (000's)	Est. U.S. ² Production (000's)	Total U.S. Production & Imports (000's)	Est. Whole- sale Units ³ (000's)	Est. U.S. Manufacturer/ Distributor Inventory (000's)	Est. ⁴ Retail Units (000's)	Est. Dealer Inventory (000's)
bef. 1969	N/A	N/A	N/A	N/A	N/A	N/A	75**
1969	640	40	680	660	20	670	65
1970	1,090	35	1,125	1,040	105	1,010	95
1971	1,540	25	1,565	1,340	330	1,240	195
1972	1,690	35	1,725	1,400	655	1,360	235
1973	1,210	45	1,255	1,580	330	1,520	295
1974	1,540*	40	1,580	1,200	710	1,200	295
1975	950*	40	990	910	790	940	265
1976	660*	80	740	1,050	480	1,050	265
1977	860*	110	970	1,100	350	1,080	285
1978	935*	80	1,015	1,000	365	975	310

* Excludes estimated imports of mopeds (motorized bicycles) as follows:
1974 - 13,000; 1975 - 32,000; 1976 - 78,000; 1977 - 190,000; 1978 - 350,000

** 1969 Estimated dealer inventory based on 3,000 estimated dealerships with a 25 unit inventory each.

¹ Source: U.S. Motorcycle Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.

² Source: MIC estimate derived by adjusting new motorcycle registrations for U.S. brands (R. L. Polk & Co., Detroit, Michigan) and information offered by Kawasaki Motors Corporation, Santa Ana, California.

³ Source: Total industry wholesale sales to dealers were estimated by MIC from wholesale sales by major brands (MIC Manufacturers Shipment Reporting System, 1972-1978, and MIC Distributor Industry Profile, 1969-1971), adjusted to include sales by other brands according to the estimated market share represented by the major brands based on new motorcycle registrations (R. L. Polk & Co., Detroit, Michigan).

⁴ Source: Total industry retail sales were estimated by MIC from new motorcycle registrations (R. L. Polk & Co., Detroit, Michigan), adjusted for the unregistered portion according to the % of registrations among wholesale sales by major brands (MIC Manufacturers Shipment Reporting System and MIC Distributor Industry Profile).

U.S. MOTORCYCLE IMPORTS By YEAR, COUNTRY ENGINE DISPLACEMENT

In 1978 935,000 motorcycles with a dutiable value of \$797 million were imported into the United States. Of these units imported, 94.3% were from Japan, 5.4% from European countries, and .3% from other countries. In addition to these motorcycles, 350,000 mopeds or motorized bicycles were imported in 1978, primarily from European countries.

The imports with relatively small engines, less than 190 cc displacement, represented 44% of the total units imported, but only 20% of the total dutiable dollar volume. Motorcycle imports with relatively large engines, over 290 cc displacement, represented another 44% of the units imported and 70% of the total dutiable dollar volume in 1978.

U.S. MOTORCYCLE IMPORTS BY COUNTRY 1972-1978

	1972	1973	1974	1975	1976	1977	1978
Japan							
Units	1,470,065	1,020,134	1,381,065	864,960	598,329	796,406	882,038
\$ Value	\$605,242,436	\$480,255,228	\$814,382,304	\$614,862,790	\$414,512,944	\$532,843,349	\$741,232,155
European Countries							
Units	159,446	129,083	103,108*	65,535*	54,683*	58,612*	50,623*
\$ Value	\$ 85,354,573	\$ 81,123,228	\$ 76,722,402	\$ 72,961,120	\$ 49,516,290	\$ 51,881,312	\$ 54,297,847
All Others							
Units	60,300	56,749	58,963*	17,757*	6,262*	4,826*	2,825*
\$ Value	\$ 6,373,658	\$ 9,097,090	\$ 20,095,259	\$ 23,336,866	\$ 2,039,747	\$ 3,189,543	\$ 1,737,985
Total							
Units	1,689,811	1,205,966	1,543,136*	948,252*	659,274	859,844*	935,486*
\$ Value	\$696,970,667	\$570,475,546	\$911,199,965	\$711,160,776	\$466,068,981	\$587,914,204	\$797,267,987

Dollar Value = dutiable value for customs purposes.

U.S. MOTORCYCLE IMPORTS BY ENGINE DISPLACEMENT 1972-1978

	1972	1973	1974	1975	1976	1977	1978
90cc & Under							
Units	345,043	276,581	292,498*	98,381*	101,280*	204,051*	215,686*
\$ Value	\$ 63,428,694	\$ 56,071,878	\$ 81,309,943	\$ 28,084,633	\$ 24,335,375	\$ 49,161,419	\$ 61,334,772
91-190cc							
Units	523,078	347,873	479,968	268,106	156,958	205,307	194,574
\$ Value	\$160,282,719	\$122,353,882	\$205,740,172	\$121,397,730	\$ 69,944	\$ 92,889,252	\$101,809,976
191-290cc							
Units	184,201	157,416	201,369	137,096	46,342	63,744	88,825
\$ Value	\$ 84,542,285	\$ 87,825,754	\$123,426,218	\$ 92,946,175	\$ 31,672,047	\$ 42,849,851	\$ 74,074,397
Over 290cc							
Units	596,331	393,320	551,236	439,853	319,092	364,429	417,600
\$ Value	\$377,039,953	\$292,922,652	\$495,130,731	\$465,569,189	\$314,135,790	\$388,864,396	\$554,167,690
Unspecified							
Units	41,158	30,776	18,065	4,816	35,602	22,313	18,801
\$ Value	\$ 11,779,316	\$ 11,301,380	\$ 5,592,901	\$ 3,193,049	\$ 25,981,568	\$ 14,149,286	\$ 5,881,152
Total							
Units	1,689,811	1,205,966	1,543,136*	948,252*	659,274*	859,844*	935,486*
\$ Value	\$696,970,667	\$570,475,546	\$911,199,965	\$711,160,776	\$466,068,981	\$587,914,204	\$797,267,987

Dollar Value = dutiable value for customs purposes.

*Excludes estimated imports of mopeds (motorized bicycles) as follows:
1974 - 12,674 units, \$2,364,460
1975 - 33,136 units, \$6,384,238
1976 - 78,920 units, \$16,909,569
1977 - 192,677 units, \$45,494,126
1978 - 350,027 units, \$90,470,166

Source: U.S. Dept. of Commerce, Domestic and International Business Administration
U.S. Motorcycle Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey

NEW MOTORCYCLE WHOLESALE SALES By MAJOR BRANDS

In 1978 estimated wholesale sales of new motorcycles to dealers by the five leading brands (Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha) in the United States were 1 million units, valued at a wholesale dollar volume of \$1.07 billion and an estimated retail dollar volume of \$1.36 billion. Of the total units wholesaled in 1978, one half (49.5%) were on-highway motorcycles, one-third were off-highway motorcycles, and the remaining 17.1% were dual purpose motorcycles. About six in every ten (62.8%) of the new motorcycles shipped to dealers in 1978 had four cycle engines, and about five in every ten (54.2%) had an engine displacement less than 350 cubic centimeters. The five leading states in wholesale units sales, California, Texas, Illinois, Ohio, and New York, accounted for nearly one third (31.4%) of the total wholesale sales for the U.S. in 1978.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS, 1974-1978

	Wholesale \$ Volume	Est. Retail \$ Volume	Total Units	Units									
				Model Type			Engine Type		Displacement Size (cc)				
				On- Highway	Off- Highway	Dual Purpose	Two Stroke	Four Stroke	Under 125 cc	125- 349 cc	350- 449 cc	450- 749 cc	750 cc- & Up
	(\$ 000's)	(\$ 000's)											
1974 (% of Total Units)	\$903,191	\$1,188,130	1,109,330 (100.0%)	452,679 (40.8%)	225,234 (20.3%)	431,417 (38.9%)	592,804 (53.4%)	516,526 (46.6%)	276,447 (24.9%)	381,916 (34.4%)	199,768 (18.0%)	122,683 (11.1%)	128,516 (11.6%)
1975 (% of Total Units)	\$821,389	\$1,068,801	830,791 (100.0%)	398,654 (48.0%)	218,904 (26.3%)	213,233 (25.7%)	378,631 (45.6%)	452,160 (54.4%)	206,906 (24.9%)	227,133 (27.3%)	142,283 (17.1%)	97,568 (11.8%)	156,901 (18.9%)
1976 (% of Total Units)	\$945,142	\$1,219,157	986,415 (100.0%)	460,477 (46.7%)	244,821 (24.8%)	281,117 (28.5%)	455,093 (46.1%)	531,322 (53.9%)	258,908 (26.2%)	277,259 (28.2%)	185,430 (18.8%)	104,510 (10.6%)	160,308 (16.2%)
1977* (% of Total Units)	\$1,069,496	\$1,362,958	1,032,034 (100.0%)	541,733 (52.5%)	276,661 (26.8%)	213,640 (20.7%)	412,495 (40.0%)	619,539 (60.0%)	287,635 (28.0%)	245,674 (23.7%)	152,881 (14.8%)	133,398 (12.9%)	212,446 (20.6%)
1978 (% of Total Units)	\$1,115,812	\$1,435,887	962,251 (100.0%)	475,958 (49.5%)	321,288 (33.4%)	165,005 (17.1%)	357,479 (37.2%)	604,772 (62.8%)	325,903 (33.9%)	195,699 (20.3%)	107,490 (11.1%)	114,745 (12.0%)	218,414 (22.7%)

* Revised

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS IN TEN LEADING STATES, 1974-1978

State	1978		1977		1976		1975		1974	
	Rank	Units	Rank	Units	Rank	Units	Rank	Units	Rank	Units
California	1	117,981	1	140,110	1	124,493	1	93,115	1	103,310
Texas	2	61,875	2	62,223	2	55,816	2	50,994	2	62,419
Illinois	3	41,673	3	47,199	3	48,960	5	38,162	7	43,022
Ohio	4	41,250	4	45,771	4	44,454	3	42,223	5	53,085
New York	5	39,431	5	42,732	7	39,618	7	33,538	8	38,006
Michigan	6	33,223	6	40,115	5	43,612	4	38,753	2	65,605
Pennsylvania	7	34,737	7	38,025	6	40,126	6	37,008	4	59,652
Indiana	8	31,224	9	33,106	9	30,121	8	26,375	9	36,479
Florida	9	31,073	8	37,530	10	38,823	9	26,041	6	43,657
Iowa	10	30,010								
Washington			10	30,134	8	33,009				
Wisconsin							10	23,652		
No. Carolina									10	33,729

Source: Manufacturers Shipment Reporting System, Annual Statistical Report, 1974-1978, Motorcycle Industry Council, Newport Beach, California. 1974 and 1975 data includes wholesale shipments to dealers by Harley-Davidson, Honda, Kawasaki, Norton Triumph, Suzuki, and Yamaha. Shipments by Norton Triumph are not included in subsequent year data.

NEW MOTORCYCLE REGISTRATIONS By STATE

In 1978 first-time registrations of new motorcycles for use on public roads in the United States were reported to be 764,097, or 78.4% of the estimated 975,000 new motorcycle retail sales.

The five leading states, California, Texas, Illinois, Ohio, and New York reported over one third (35.4%) of the nation's new motorcycle registrations. A slightly greater portion of the estimated retail sales of new motorcycles tend to be registered in the mideastern and eastern states than in the western and southern states.

NEW MOTORCYCLE REGISTRATIONS BY STATE, 1973-1978

	1973	1974	1975	1976	1977	1978
Total U.S.	1,189,789	1,024,084*	746,778	783,100	848,588	764,097
State						
Alabama	19,833	14,383	10,947	13,615	18,325	14,400
Alaska	2,474	1,431	1,985	3,025	3,631	2,636
Arizona	15,819	14,719	7,887	8,729	10,202	9,134
Arkansas	13,263	9,950	6,145	6,190	533	3,200
California	101,253	94,473	70,142	83,626	6,106	110,072
Colorado	18,888	17,199	12,093	12,104	13,792	12,572
Conn.	12,215	9,357	7,426	8,623	9,026	8,500
Delaware	2,041	1,951	1,463	1,485	1,408	1,191
D.C.	1,327	860	515	661	763	519
Florida	58,860	50,213	29,772	27,770	30,890	26,994
Georgia	40,036	28,960	17,424	16,914	21,662	19,055
Hawaii	2,067	1,724	855	966	1,344	1,900
Idaho	10,559	9,646	7,477	8,898	9,937	8,623
Illinois	49,584	43,159	38,321	40,397	41,157	35,168
Indiana	36,326	31,150	21,957	21,705	24,560	21,267
Iowa	30,405	27,303	19,944	16,107	18,747	22,953
Kansas	20,183	14,165	11,116	11,575	11,594	10,231
Kentucky	15,854	14,215	11,184	9,596	10,697	8,137
Louisiana	16,296	17,058	14,109	15,809	19,749	18,487
Maine	4,646	3,717	3,475	4,941	5,243	5,244
Maryland	13,652	17,835	12,115	13,264	14,386	11,726
Mass.	13,791	15,671	10,772	10,400	12,231	9,815
Michigan	92,072	63,440	40,020	38,085	38,561	29,901
Minn.	27,736	23,837	18,343	19,972	21,039	18,385
Miss.	12,608	11,532	7,136	7,260	9,045	8,989
Missouri	31,063	25,882	18,078	17,310	16,239	13,336
Montana	9,565	7,466	6,209	5,993	7,028	5,541
Nebraska	9,833	9,673	8,155	8,637	8,413	7,037
Nevada	2,952	2,918	2,873	2,991	3,642	3,584
N. H.	6,947	5,624	4,007	4,842	5,668	4,152
New Jersey	23,329	22,364	15,921	19,253	20,012	17,195
New Mexico	5,578	5,021	4,767	6,591	7,881	7,529
New York	32,598	34,701	29,774	31,258	35,267	31,197
N. C.	31,469	26,453	13,916	13,076	11,752	8,370
N. D.	4,801	4,936	4,211	4,245	4,090	3,724
Ohio	59,913	48,928*	43,442	39,836	38,783	32,329
Oklahoma	N/A	N/A	N/A	N/A	N/A	N/A
Oregon	27,960	20,631	15,258	17,058	18,802	16,329
Penn.	69,265	63,079	40,074	39,857	37,796	30,751
R. I.	3,794	3,589	2,252	2,542	3,166	2,440
S. C.	15,890	14,453	8,539	6,070	5,780	4,815
S. D.	4,861	4,991	4,041	4,532	3,481	4,216
Tenn.	28,572	20,773	13,883	12,813	12,894	11,609
Texas	73,981	61,341	49,880	57,106	68,035	61,603
Utah	11,321	9,121	8,488	9,993	10,711	9,691
Vermont	2,342	2,879	1,965	2,506	2,695	2,403
Virginia	22,169	19,953	12,040	10,974	9,770	9,840
Washington	34,670	31,509	25,189	31,465	32,544	28,708
West Va.	14,210	10,503	7,279	7,405	7,481	5,389
Wisconsin	24,637	25,677	21,038	22,190	18,708	19,918
Wyoming	4,181	3,771	2,876	2,840	3,322	3,292

*Adjusted to include an estimate for incomplete Ohio registrations.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan, Oklahoma excluded. Permission for further use must be obtained from R.L. Polk & Co.

NEW MOTORCYCLE REGISTRATIONS By LEADING BRANDS

The nation's five major brands accounted for 96.4% of the new motorcycles registered for use on public roads in 1978. Honda, the leading brand during the past two decades, ranked first in 1978 with 35.9% of the street registered market, followed by Yamaha with 25.9%, Kawasaki with 15.0%, and Suzuki with 13.3%. Harley-Davidson, the only major domestic manufacturer, ranked fifth in 1978 with 6.3% of the new motorcycle registrations. The market share for each of the remaining motorcycle brands distributed in the United States was reported to be less than 1% in 1978.

NEW MOTORCYCLE REGISTRATIONS 10 LEADING BRANDS BY MARKET SHARE, 1973-1978

THE MOTORCYCLE MARKET

Make	1978		1977		1976		1975		1974		1973	
	Rank	Mrkt. Share	Rank	Mrkt. Share	Rank	Mrkt. Share	Rank	Mrkt. Share	Rank	Mrkt. Share	Rank	Mrkt. Share
Honda	1	35.9	1	40.5	1	37.9	1	40.2	1	43.0	1	42.1
Yamaha	2	25.9	2	21.2	2	20.4	3	16.2	2	20.3	2	20.3
Kawasaki	3	15.0	3	16.8	3	17.1	2	17.2	3	12.8	4	12.1
Suzuki	4	13.3	4	11.2	4	11.4	4	12.8	4	10.7	3	12.9
Harley-Davidson	5	6.3	5	6.1	5	6.8	5	6.9	5	5.7	5	5.0
Triumph	6	.8	7	.7	7	.9	8	.5	9	.7	6	2.3
BMW	7	.6	6	.9	6	.9	6	1.0	6	.9	8	.6
Husqvarna	8	.5	10	.3	—	—	10	.5	—	—	—	—
Hodaka	9	.5	8	.6	8	.6	—	—	7	.8	7	.7
Bultaco	10	.3	9	.3	—	—	9	.5	10	.4	10	.4
Norton	—	—	—	—	9	.6	7	.6	8	.7	9	.5
Indian	—	—	—	—	10	.4	—	—	—	—	—	—
BSA	—	—	—	—	—	—	—	—	—	—	—	—

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan, Oklahoma excluded. Permission for further use must be obtained from R.L. Polk & Co.

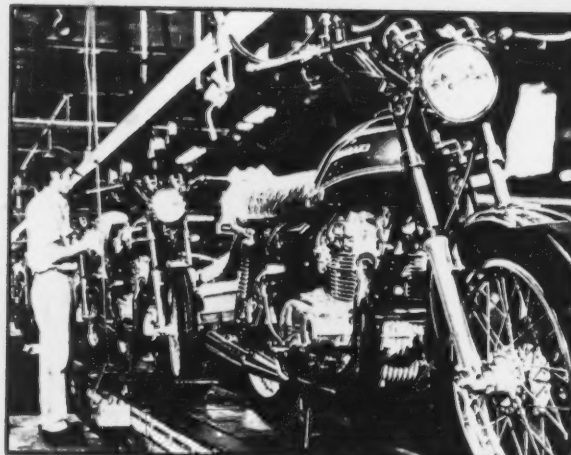


Photo Courtesy of Kawasaki Motors Corporation

MANUFACTURERS & DISTRIBUTORS

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS AND DISTRIBUTORS

In 1978 the five leading brands distributed in the United States, Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha, accounted for roughly 96% of the nation's estimated 975,000 new motorcycle retail sales.

Four of the five major brands are manufactured in Japan and have been distributing motorcycles in the U.S. a relatively short time, about twenty years. Harley-Davidson, the fifth ranking brand, is the only major domestic manufacturer and has been manufacturing and distributing motorcycles in the U.S. for over seventy years. The five leading U.S. distributors also sell a wide range of non-motorcycle related products in the U.S., including automobiles, snowmobiles, mopeds, golf carts, go carts, motocross bicycles, power products, and sailboats.

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

MANUFACTURERS AND DISTRIBUTORS

Brand	U.S. Motorcycle Distributor	Motorcycle Manufacturer	Year of U.S. Incorporation	Other Products Sold in U.S.
Harley-Davidson	Harley-Davidson Motor Co., Inc. 3700 W. Juneau Avenue Milwaukee, WI 53201 (414) 342-4680	Same as distributor	1907	Motorcycle accessories, golf carts, golf cart equipment.
Honda	American Honda Motor Company, Inc. 100 West Alondra Blvd. Gardena, CA 90247 (213) 321-8680	Honda Motor Co., Ltd. No. 27-8, 6 Chome, Jingu-mae Shibuya-Ku, Tokyo, 150, Japan	1959	Automobiles, automobile accessories, motorcycle accessories, power products (generators, rototillers, outboards, lawnmowers), all-terrain vehicles, and mopeds (motorized bicycles).
Kawasaki	Kawasaki Motors Corp., U.S.A. 2009 E. Edinger Avenue Santa Ana, CA 92705 (714) 835-7000	Kawasaki Heavy Industries 1-1 Chome, Kawasaki-CHO P.O. Box 16 Akashi City, Japan Kawasaki Motors Corp., U.S.A. 5600 N.W. 27th St. Lincoln, Nebraska	1967	Snowmobiles, Jet Ski, accessories for motorcycles, snowmobiles and Jet Skis, motocross bicycles, generators.
Suzuki	U.S. Suzuki Motor Corp. 13767 Freeway Drive Santa Fe Springs, CA 90670 (213) 921-4461 (714) 523-5321	Suzuki Motor Co., Ltd. Hamamatsu-Nishi P.O. Box 1 432-91 Hamamatsu, Japan	1963	Motorcycle accessories.
Yamaha	Yamaha Motor Corp., U.S.A. 6620 Orangethorpe Buena Park, CA 90620 (714) 522-9444 Yamaha Engineering Division 6555 Katella Ave. Cypress, CA 90630 (714) 761-7330	Yamaha Motor Co., Ltd. 2500 Shingai, Iwata-Shi Shizuoka-Ken, Japan	1960	Snowmobiles, snowmobile and motorcycle accessories, go cart engines, go carts, golf carts, motocross bicycles, generators, mopeds (motorized bicycles), sailboats.

Source: Information obtained by the Motorcycle Industry Council from the U.S. distributors above.

OTHER U.S. MOTORCYCLE MANUFACTURERS/ DISTRIBUTORS

While the five major brands accounted for roughly 96% of 1978 retail sales in the United States, the remaining 4% of new motorcycle sales are distributed among nearly forty brands.

About two thirds of the motorcycle sales from these forty brands are generated by BMW, Bultaco, Can-Am, Hodaka, Husqvarna, Moto Guzzi, Triumph, and Vespa. Although the U.S. motorcycle market share for most of the brands listed below is quite small, generally less than 5%, some of these brands are major contributors to foreign markets.

OTHER 1979 U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

BRAND	PRIMARY U.S. MANUF./DISTR.	COUNTRY OF MANUFACTURE			
Ammex	Apache Limited 20872 Currier Road Walnut, CA 91789 (714) 598-1985	Mexico	Ducati	Berliner Motor Corp. Railroad St. & Plant Rd. Hasbrouck Heights, NJ 07604 (201) 288-9696	Italy
Arco EZ Rider	Alexander-Reynolds Corp. 123 South Newman Street Hackensack, NJ 07601 (201) 342-7600	U.S.	Flexo Big Bear Scrambler	Flexo Products Co. 5180 Venice Blvd. Los Angeles, CA 90019 (213) 931-1471	U.S.
BMW	Butler & Smith — East Walnut St. & Hudson Ave. Norwood, NJ 07648 (201) 767-1223 Butler & Smith — West 135 E. Stanley Street Compton, CA 90220 (213) 638-8508	West Germany	Fox	Fox Corporation 1111 West Racine St. Janesville, WI 53545 (608) 752-9441	U.S.
Benelli	Benelli East, Inc. 1930 West Street Annapolis, MD 21401 (301) 266-5700 Cosmopolitan Motors Jacksonville & Meadowbrook Rds Hatboro, PA 19040 (215) 672-9100	Italy	Gemini	Fun Center Distributors Rt. 2 Box 6449 Ozark, MO 65721 (417) 485-6170	Taiwan
Bultaco	Bultaco International Ltd. P.O. Box 2237 Virginia Beach, VA 23452 (804) 463-2751	Spain	Heald	Heald, Inc. P.O. Box 1148 Benton Harbor, MI 49022 (616) 849-3400	U.S.
Can-Am	Bombardier Corporation Can-Am Division 4505 W. Superior Duluth, MN 55806 (218) 628-2886	Canada	Hercules- Sachs	Penton Brothers Inc. 3709 W. Erie Avenue Lorain, OH 44053 (216) 244-4101	West Germany
Carabela	Cycle-Kart Racers, Inc. 4131 S. Sheridan Rd. Tulsa, OK 74145 (918) 663-4080	Mexico	Husqvarna	Husqvarna Motorcycle Co., Inc. 4925 Mercury St. San Diego, CA 92111 (714) 676-1414 Husqvarna at Columbus 2400 Marilyn Park Lane Columbus, OH 43219 (614) 476-0766	Sweden Sweden
Casal	Casal Motors, USA 6020 Eastern Avenue Baltimore, MD 21224 (301) 633-4620	Portugal	Indian	Seneca Motorcycle Corp. 1074 E. Jericho Turnpike Huntington, NY 11743 (516) 271-1900	Taiwan
CCM	CCM Imports America Route 1 Huntley, IL 60142 (815) 923-2155	England	Italjet	Italjet, U.S.A. 13148 Saticoy St. N. Hollywood, CA 91605 (213) 982-2000	Italy
Cheetah	Recreational Technology, Inc. 1000 S. Fifth Milwaukee, WI 53204 (414) 645-1985	U.S.	Jawa/CZ	American Jawa Ltd. 185 Express Street Plainview, L.I., NY 11803 (516) 938-3210 South Bay Motorcycles 2001 Artesia Blvd. Redondo Beach, CA 90278 (213) 379-3344	Czechoslo- vakia
			KTM	KTM America 1906 Broadway Lorain, OH 44052 (216) 244-2726 (East Coast Distributor)	Austria

BRAND	PRIMARY U.S. MANUF./DISTR.	COUNTRY OF MANUFACTURE
KTM	KTM Imports U.S.A. 9825 Mason Avenue Chatsworth, CA 91311 (213) 882-8860 (West Coast Distributor)	Austria
Lambretta	Int'l. Sportcycles, Inc. 4000 Kennedy Blvd. Union City, NJ 07087 (201) 863-2500	Spain
Laverda	Yankee Corporation P.O. Box 36 Schenectady, NY 12301 (518) 372-4726	Italy
Maico	Maico Motorcycles, Inc. 1256 Progress Road Wilroy Industrial Park Suffolk, VA 23434 (804) 934-2305 (East Coast Distributor)	West Germany
	Maico West 110 East Santa Anita Avenue Burbank, CA 91502 (213) 849-6066 (West Coast Distributor)	
	Maico Midwest Inc. Route 1, Box 211 Antioch, IL 60002 (312) 395-2100 (Central Distributor)	
Montesa	Cosmopolitan Motors, Inc. Jacksonville & Meadowbrook Rds Hatboro, PA 19040 (215) 672-9100 (East Coast Distributor)	Spain
	Viva Distributing Co. 10625 Vanowen Burbank, CA 91505 (213) 766-6101 (West Coast Distributor)	
Moto Guzzi	Berliner Motor Corporation Railroad St. & Plant Rd. Hasbrouck Heights, NJ 07604 (201) 288-9696	Italy
Moto Morini	Herdan Corporation Route 61 Port Clinton, PA 19549 (215) 562-3155	Italy
Ossa	Ossa Sales Corporation P.O. Box 36 Schenectady, NY 12301 (518) 372-4726	Spain
Puch	Steyr Daimler Puch of America Corporation 80 Fieldpoint Rd. P.O. Box 7777 Greenwich, CT 06830 (203) 622-0350	Austria
Rickman	Target Products 2724 West Main Street Alhambra, CA 91801 (213) 284-3238	England

SWM	Yankee Corporation P.O. Box 36 Schenectady, NY 12301 (518) 372-4726	Italy
Trail Bronc	Heald, Inc. P.O. Box 1148 Benton Harbor, MI 49022 (616) 849-3400	U.S.
Tri-Rod	Bletz Industries, Inc. 150 Distl Avenue Mansfield, OH 44903 (419) 522-0665	U.S.
Tri-Sport	Promark Products Corporation of Ohio P.O. Box 738 Norwalk, OH 44857 (419) 668-3721	U.S.
Triumph	Triumph Motorcycles America, Inc. P.O. Box 1060 Placentia, CA 92670 (714) 996-8200	England
Vespa	Vespa of America 355 Valley Drive Brisbane, CA 94005 (415) 468-0400	Italy
	Vespa of America Eastern Regional Office 1450 Imperial Way Woodbury, NJ 08096 (609) 853-1200	
NOTE: This list includes only those companies manufacturing and/or distributing motorcycles in the U.S. as of April 12, 1979. Although this information was obtained from the most authoritative sources available (individual companies were contacted by the Motorcycle Industry Council), the Motorcycle Industry Council is not responsible for accuracy or completeness.		

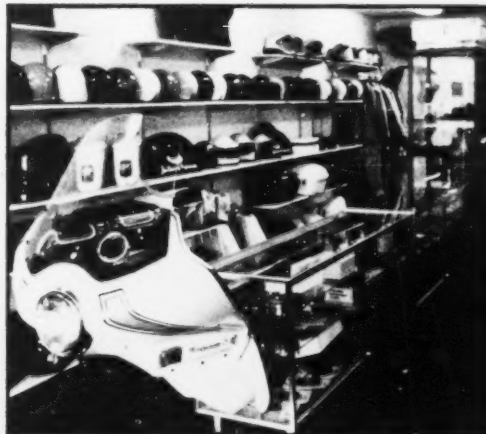


Photo Courtesy of Motorcycle Dealernews

THE MOTORCYCLE AFTERMARKET

AFTERMARKET YEARS IN BUSINESS AND MOTORCYCLE RELATED SALES

Approximately 1,500 companies in the U.S. are engaged in the manufacture and/or distribution of motorcycle aftermarket products, such as replacement parts, accessories, and riding apparel. While foreign manufacturers dominate the motorcycle manufacturing portion of the industry, the majority of aftermarket products are manufactured in this country with the exception of many replacement parts which are imported by the foreign motorcycle manufacturers.

A survey of motorcycle aftermarket companies indicated that most firms are small in terms of revenues generated from motorcycling; the average dollar volume for the majority of aftermarket companies in 1978 was between \$300,000 and \$600,000. Distributing companies and those which both distribute and manufacture motorcycle aftermarket products are almost totally dependent on the motorcycle market, while the majority of manufacturing companies derive less than half of their total revenues from the motorcycle industry.

AFTERMARKET MANUFACTURER/DISTRIBUTOR PROFILE

	Average Years in Business	Average Number of Employees	Average Annual Dollar Volume of Motorcycle Business	Percent of Total Sales which are Motorcycle Related
Companies Both Manufacturing and Distributing	10.6	136	\$460,000	PERCENT OF TOTAL REVENUE FROM MOTORCYCLE BUSINESS
Manufacturers	7.9	18	\$600,000	PERCENT OF TOTAL REVENUE FROM MOTORCYCLE BUSINESS
Distributors	9.6	13	\$312,500	PERCENT OF TOTAL REVENUE FROM MOTORCYCLE BUSINESS

Key: 1976-1977

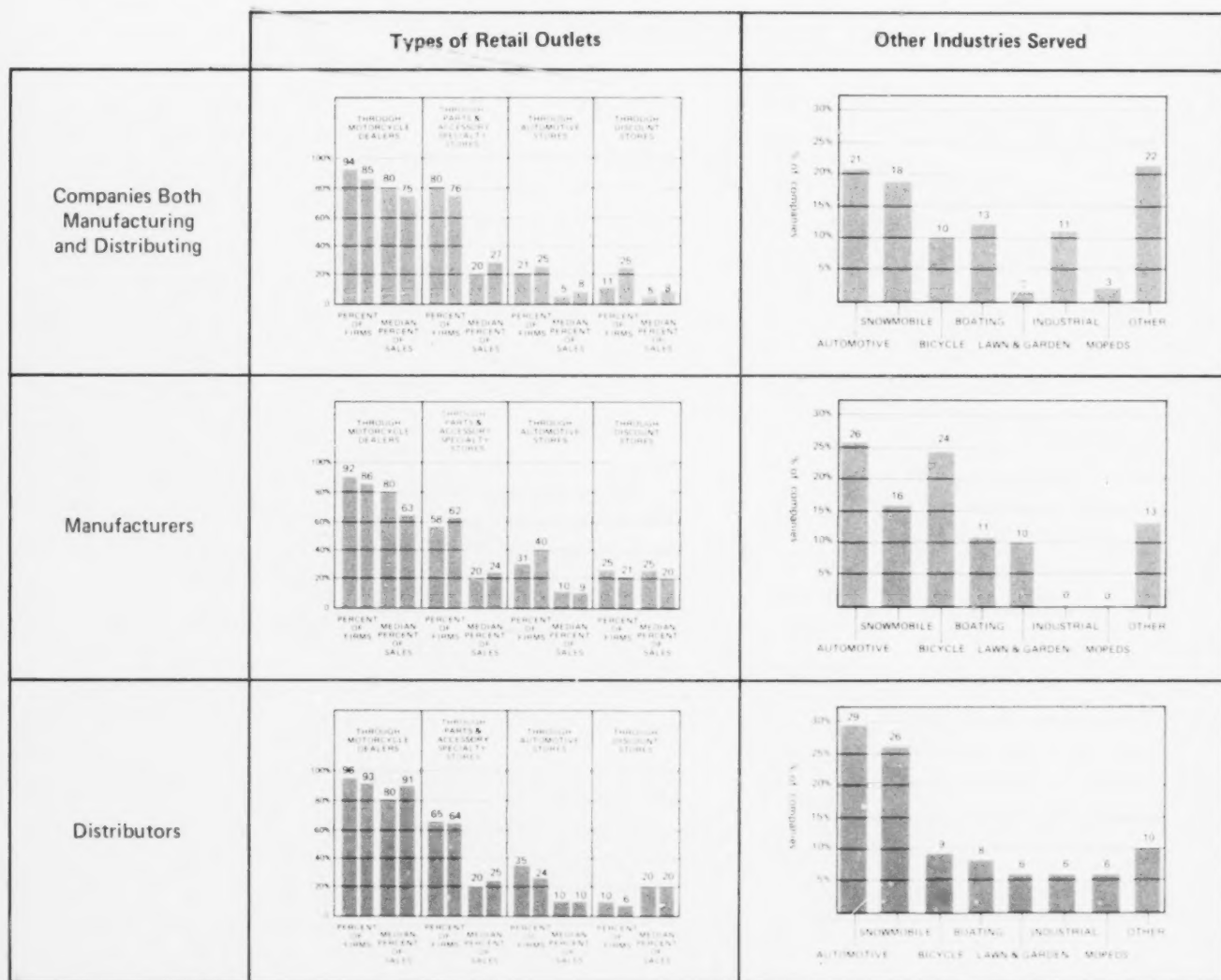
Source: Motorcycle Dealernews, William Lawrence Corp., Santa Ana, California, December 1977 and 1978

AFTERMARKET RETAIL OUTLETS AND OTHER INDUSTRIES SERVED

A survey of motorcycle aftermarket companies indicated that the vast majority of aftermarket firms in 1977 distributed their products through motorcycle dealerships, which also accounted for the majority of aftermarket sales. About two thirds of the aftermarket companies distributed products through parts and accessory specialty stores, which generated roughly one fourth of the aftermarket product sales. Automotive stores handled motorcycle aftermarket products for about 25-40% of the aftermarket companies, but generated less than 10% of the sales. A small number of aftermarket firms have been fairly successful distributing products through discount stores.

Firms manufacturing and/or distributing motorcycle aftermarket products most often served the automotive industry in addition to the motorcycle industry. The snowmobile industry was the next most frequently served industry by motorcycle aftermarket companies, followed by the bicycle and lawn and garden industries. Less than 10% manufactured or distributed mopeds or moped related products.

AFTERMARKET MANUFACTURER/DISTRIBUTOR PROFILE



Key 1976 1977

Source: Motorcycle Dealernews, William Lawrence Corp., Santa Ana, California, December, 1977.

TOP SELLING AFTERMARKET PRODUCTS, FINANCING OF AFTERMARKET SALES

Based on a nationwide survey of motorcycle dealerships, helmets and tires continued to be the top selling accessory/apparel aftermarket items in 1978. Street/touring accessories, such as fairings, luggage racks, back rests, and saddlebags, again dominated the list of top selling accessory/apparel items.

Consumer research indicated that spark plugs were number one in sales of replacement or maintenance products in 1977.

Although accessory products were purchased most often with cash from motorcycle dealerships, financing and credit card purchases have become more common in recent years.

TOP SELLING AFTERMARKET PRODUCTS

Top Selling Accessory & Apparel Items¹

1978 Rank	1977 Rank
1 — tires	2
2 — helmets	1
3 — fairings	3
4 — luggage racks	4
5 — safety bars	5
6 — exhaust systems	7
7 — backrests	6
8 — eye protectors	9
9 — saddlebags	10
10 — seats	8

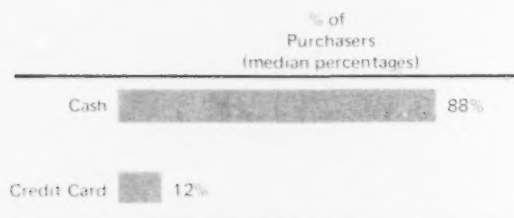
Top Selling Replacement Parts²
and Maintenance Items*

Rank	Product
1	Spark Plugs
2	Tires
3	Drive Chain
4	Pistons/Rings
5	Levers/Pedals
6	Cables
7	Sprockets
8	Battery
9	Headlight

*Parts replaced due to defect, wear, or accident.

FINANCING OF AFTERMARKET SALES

How Accessory Products were Purchased¹
from Motorcycle Dealerships



¹Source: Motorcycle Dealernews, William/Lawrence Corp., Santa Ana, California, July, 1978.

²Source: Trendex Motorcycle Market Study, conducted for Cycle Magazine by Trendex Inc., Westport, Connecticut, February 1978.

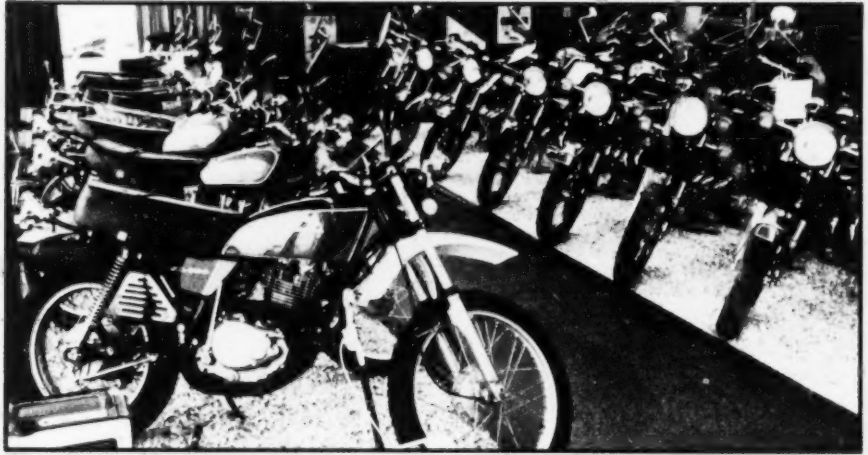


Photo Courtesy of Motorcycle Dealernews

THE RETAIL MARKETPLACE

MOTORCYCLE RETAIL OUTLETS By STATE

Of the estimated 10,930 retail outlets selling motorcycles and related products in the U.S. in 1978, 66.8% were franchised motorcycle dealers, 26.8% were motorcycle parts and accessories specialty stores, and the remaining 6.4% were other types of retail outlets, principally automotive parts stores.

In all states but Alaska retail motorcycle dealers have formed nonprofit associations to engage in government relations and other activities for the good of the motorcycle industry in their state. The MIC recognizes and supports these state associations with several informational exchange programs. The addresses of the state associations are listed on the last page of this publication.

	1978 Franchised Motorcycle Dealers	1978 Motorcycle Parts Accessories Specialty Store	1978 Other* Outlets	1978 Total
Total U.S.	7,302	2,926	702	10,930
State				
Alabama	115	29	12	156
Alaska	34	12	3	49
Arizona	84	41	11	136
Arkansas	87	23	8	118
California	641	382	133	1,156
Colorado	147	40	10	197
Connecticut	75	37	7	119
Delaware	18	6	0	24
D.C.	1	0	0	1
Florida	307	158	48	513
Georgia	155	57	14	226
Hawaii	16	14	0	30
Idaho	76	26	9	111
Illinois	335	140	35	510
Indiana	241	83	19	343
Iowa	172	52	8	232
Kansas	127	46	5	178
Kentucky	104	44	7	155
Louisiana	134	47	9	190
Maine	61	18	6	85
Maryland	85	32	5	122
Mass.	115	42	13	170
Michigan	354	177	24	555
Minn.	185	67	24	276
Miss.	62	21	5	88
Missouri	162	61	17	240
Montana	85	32	7	124
Nebraska	86	32	4	122
Nevada	30	20	4	54
N.H.	49	24	2	75
N.J.	149	63	19	231
N.M.	55	33	2	90
N.Y.	347	159	34	540
N.C.	153	56	12	221
N.D.	49	16	4	69
Ohio	398	180	43	621
Oklahoma	108	37	8	153
Oregon	107	71	4	182
Penn.	424	121	25	570
R.I.	19	10	2	31
S.C.	75	24	7	106
S.D.	45	12	6	63
Tenn.	146	53	8	207
Texas	406	184	40	630
Utah	71	10	2	83
Vermont	34	1	2	37
Virginia	141	33	10	184
Wash.	136	30	6	172
W. Virginia	66	12	3	81
Wisc.	193	50	13	256
Wyoming	37	8	3	48

*Principally automotive parts stores

Source: Motorcycle Dealernews, William/Lawrence Corp., Santa Ana, CA, December 1978.

MOTORCYCLE DEALER PROFILE AND ESTIMATED DOLLAR VOLUME

It is estimated that in 1978 retail sales by franchised motorcycle dealers equaled 3.9 billion dollars, of which slightly less than one half (47%) were from new and used motorcycle sales. The remaining revenues generated by franchised motorcycle dealers are attributed to sales of motorcycle parts, accessories, servicing, and products not related to the motorcycle industry.

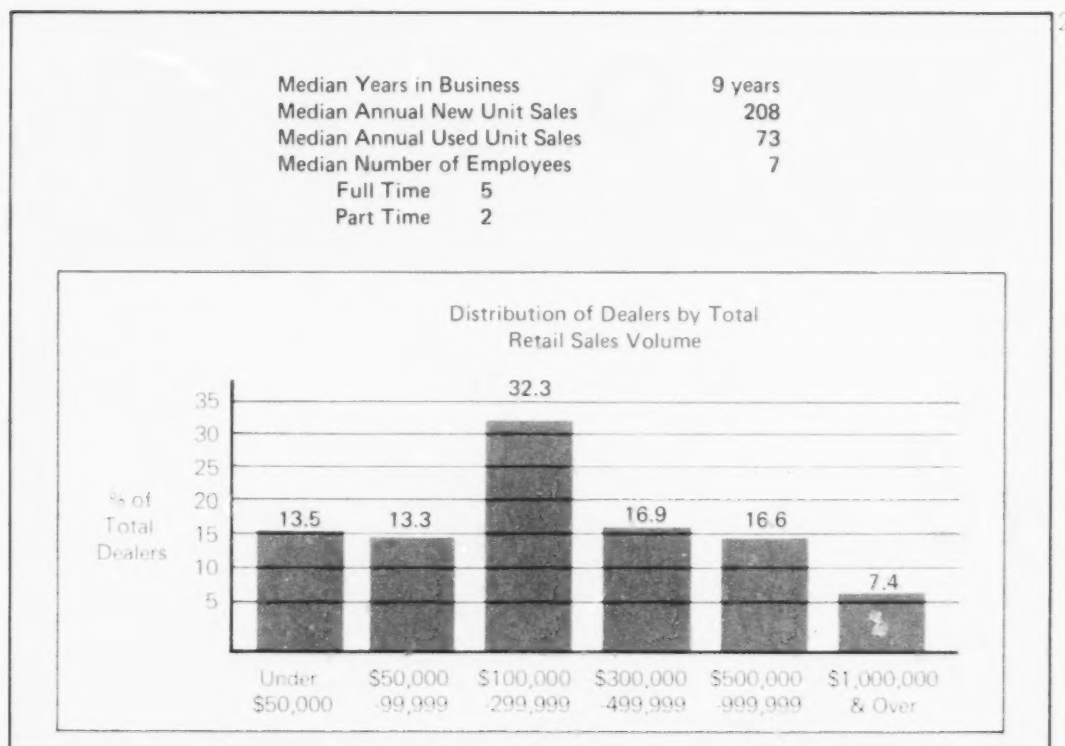
Total retail sales volumes vary greatly among motorcycle dealers. In 1978 about 32% of the dealers generated a retail sales volume between \$100,000 to \$299,000, 27% generated less than \$100,000, and 41% generated \$300,000 or more.

The typical motorcycle dealership has been in business 9 years and is staffed by 7 employees. In addition to the retail sales estimated here for franchised dealers, significant accessory and service sales for motorcycles are generated by independent non-franchised stores and repair facilities.

ESTIMATED 1978 U.S. RETAIL SALES BY FRANCHISED MOTORCYCLE DEALERS

	1978	1977 Revised ¹
New Motorcycle Sales	\$1.46 billion	\$1.42 billion
Used Motorcycle Sales	.39 billion	.35 billion
Accessory Sales	.63 billion	.42 billion
Service Sales	.67 billion	.41 billion
Parts Sales	.55 billion	.45 billion
Other	.23 billion	.19 billion
Total	\$3.93 billion	\$3.24 billion

1978 MOTORCYCLE DEALER PROFILE



¹Source: Motorcycle Industry Council estimate based on MIC Manufacturers Shipment Reporting System and findings from the 1978 Motorcycle Dealer Survey by Motorcycle Dealernews.

²Source: Motorcycle Dealernews, William/Lawrence Corp., Santa Ana, CA., December 1978.

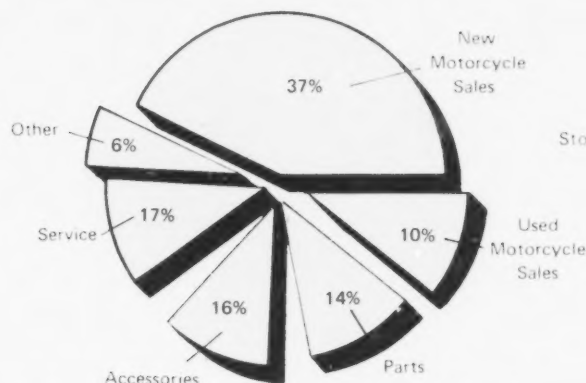
DEALER DISTRIBUTION OF RETAIL SALES AND FLOORSPACE, DEALER FLOORING AND CUSTOMER FINANCING

Sales of new and used motorcycles accounted for nearly half (47%) of the annual retail sales dollars generated by the typical motorcycle dealership in 1978. Another 30% of the annual dealer dollar volume was divided between sales of accessories (16%) and parts (14%). Service related sales accounted for 17% of the dollar volume, and 6% was attributed to the sale of non-motorcycle products such as automobiles, gardening equipment, snow-mobiles, etc.

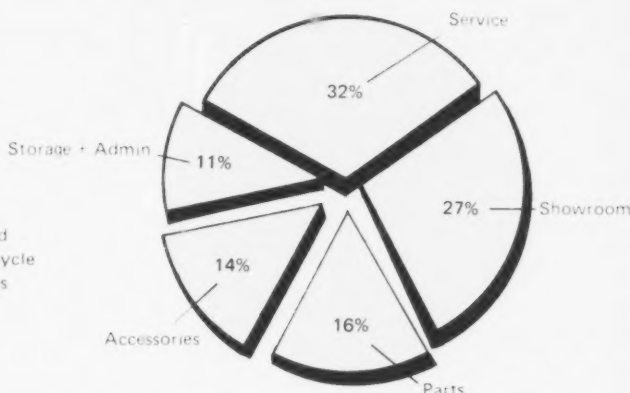
About one third (32%) of the typical dealer floorspace was allocated to servicing, and almost another third (30%) was allocated to parts and accessories. The showroom accounted for 27% and the storage and administrative area for 11% of the floorspace in 1978.

Based on a 1977 dealer survey, financing was most frequently arranged through banks for customer purchases and for dealer flooring.

**1978 TYPICAL DISTRIBUTION OF RETAIL SALES
AT MOTORCYCLE DEALERSHIPS**



**1978 TYPICAL DEALER ALLOCATION
OF FLOORSPACE**



HOW CUSTOMERS FINANCED 1977 MOTORCYCLE PURCHASES

	% of Customers
Bank	66%
Finance Co.	12%
Credit Union	20%
Other	2%

DEALER 1977 FLOOR FINANCING SOURCES

	% of Dealers
Bank	59%
Motorcycle Mfr.	22%
Commercial Lender	14%
Other	5%

Source: Motorcycle Dealernews, William/Lawrence Corp., Santa Ana, CA, December 1977 and December 1978.



Photo Courtesy of Motorcyclist Magazine



Photo Courtesy of Kawasaki
Motors Corporation

MOTORCYCLE USAGE

U.S. MOTORCYCLE USAGE ON-HIGHWAY AND OFF-HIGHWAY By STATE

Of the 7.3 million motorcycles in use in 1978, it is estimated that 5.1 million were registered for use on public roads and 4.7 million were used off public highways some of the time.

Of the 5.1 million motorcycles registered for use on public highways, 62% were on-highway motorcycles, and the remaining 38% were dual purpose motorcycles. It is assumed that off-highway motorcycles were not registered for use on public roads because they do not meet federal requirements for use on public roads.

Dual purpose motorcycles represented 41% of the motorcycles used off-highway at some time. An additional 38% were off-highway motorcycles, and as many as 21% were on-highway motorcycles used off-highway.

MOTORCYCLES USED ON AND OFF-HIGHWAY IN 1978

	U.S. Total	Model Type*		
		On-Highway	Off-Highway	Dual purpose
Total Motorcycles in Use	7,305,000 (100%)	3,326,600 (100%)	1,776,600 (100%)	2,201,800 (100%)
Motorcycles Registered for Use** on Public Highways (% of total in use)	5,138,000 (70%)	3,193,500 (96%)	0 (0%)	1,944,500 (88%)
Motorcycles Used Off-Highway at Some Time (% of total in use)	4,678,900 (64%)	964,700 (29%)	1,776,600 (100%)	1,937,600 (88%)

* See page 4 for model type definitions.

MOTORCYCLE USAGE BY STATE IN 1978

State	Total Motorcycles In Use	Estimated** On-Highway Motorcycle Registrations	Motorcycle Used Off-Highway At Some Time	State	Total Motorcycles In Use	Estimated** On-Highway Motorcycle Registrations	Motorcycle Used Off-Highway At Some Time
Alabama	135,400	70,000	88,900	Montana	55,700	50,000	42,200
Alaska	27,300	14,000	21,000	Nebraska	81,900	51,000	53,600
Arizona	98,400	63,000	66,900	Nevada	30,400	22,000	21,800
Arkansas	82,600	29,000	58,700	N. H.	44,000	37,000	23,700
California	862,500	683,000	573,100	N. J.	135,700	95,000	80,800
Colorado	119,800	110,000	80,200	N. M.	50,100	42,000	34,300
Connecticut	67,500	72,000	38,200	N. Y.	270,900	142,000	146,800
Delaware	16,500	8,000	10,400	N. C.	191,000	106,000	121,400
D. C.	3,800	4,000	1,800	N. D.	40,000	27,000	27,600
Florida	253,000	184,000	155,500	Ohio	333,200	259,000	195,400
Georgia	190,800	97,000	127,700	Oklahoma	129,300	114,000	84,800
Hawaii	Not Avail.	7,000	Not Avail.	Oregon	130,000	90,000	95,800
Idaho	57,800	47,000	44,100	Penn.	316,400	245,000	199,900
Illinois	312,900	249,000	184,500	R. I.	22,700	27,000	13,000
Indiana	231,800	156,000	135,800	S. C.	73,600	42,000	47,000
Iowa	172,300	170,000	104,200	S. D.	37,500	30,000	25,400
Kansas	102,500	83,000	65,000	Tenn.	192,100	84,000	125,600
Kentucky	101,700	62,000	68,300	Texas	436,400	290,000	290,600
Louisiana	153,200	72,000	107,600	Utah	80,200	55,000	61,100
Maine	39,600	35,000	21,900	Vermont	19,200	19,000	11,000
Maryland	100,900	69,000	59,900	Virginia	147,100	74,000	90,100
Mass.	100,400	88,000	57,400	Wash.	201,800	117,000	145,100
Michigan	371,500	258,000	234,000	West Va.	82,600	57,000	59,400
Minn.	164,100	154,000	102,100	Wisc.	176,400	143,000	100,400
Miss.	75,200	27,000	52,500	Wyoming	26,900	17,000	20,600
Missouri	158,400	92,000	101,800	U.S. Totals	7,305,000	5,138,000	4,678,900

** Total U.S. and several state registrations figures may be inflated due to the implementation of staggered registration renewal systems and off highway vehicle registration reporting systems, and the reporting of dual registration and titling transactions. No accurate revisions are available at this time.

Source: 1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

U.S. Department of Transportation, Federal Highway Administration.

MOTORCYCLE STREET USAGE, COMMUTING AND OTHER PURPOSES

Based on consumer research conducted in 1975, it is estimated that 58% of all motorcycles used on the street in 1978 were used at some time to commute to work or school. The incidence of commuting to work (52%) was higher than commuting to school (16%), and both the time and mileage traveled to work tended to be slightly longer than that traveled to school. When motorcycles were used on a regular basis for commuting, the number of trips per week also tended to be slightly greater for commuting to work than to school.

TYPES OF MOTORCYCLE STREET USAGE

	Number of Motorcycles	% of Total Used on Street
Total Motorcycles Registered for Street Use	5,138,000	100%
Motorcycles Used for Commuting (at some time)	2,980,000	58%
Commuting to Work (at some time)	2,671,800	52%
When used regularly during good weather:		
Median round trips per week	2.5	
Median miles one way	6.0	
Median minutes one way	14.0	
Commuting to School (at some time)	822,100	16%
When used regularly during good weather:		
Median round trips per week	2.0	
Median miles one way	5.0	
Median minutes one way	11.0	

As expected, nearly all (98%) motorcycles used on the street were used for purposes other than commuting. Trips made for purposes other than commuting tended to be relatively short, even when used regularly during good weather. 61% were used for trips under 2 miles, 56% for trips from 2 to 10 miles, and 38% for trips over 10 miles.

	Number of Motorcycles	% of Total Used on Street
Motorcycles Used on Street for Purposes Other Than Commuting	5,035,200	98%
When used regularly during good weather:		
One or more trips taken per week under 2 miles one way	3,134,200	61%
Median round trips per week	5.0	
One or more trips taken per week 2-10 miles one way	2,877,300	56%
Median round trips per week	3.6	
One or more trips taken per week over 10 miles one way	1,952,400	38%
Median round trips per week	2.0	

Motorcycles used on the street were regularly ridden an average of 7 months a year, nationwide. Motorcycles were more likely to be used on a year-round basis in warmer areas, such as the West and the South where the median number of months used regularly was 7 and 12, respectively. The median number of months for regular street riding in the East and Midwest was 6 months. As expected, June, July, and August were the months when regular street riding occurred most frequently, while December, January, and February were when regular street riding reaches its lowest point.

Source: Survey of Motorcycle Ownership, Usage and Maintenance, conducted for the Motorcycle Industry Council by the Gallup Organization, Princeton, New Jersey, January 1975.

1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS By STATE

Excluding Alaska which is predominantly uninhabited public land, just over one fifth (22%) of the total U.S. acreage, or 419 million acres, is public land managed by federal and state government. Of this 419 million acres, 86% is in the western states.

In 1978 an estimated 4.7 million motorcycles were used by 11.7 million people for off-highway recreational purposes. In 1978 the off-highway motorcycle industry generated an estimated \$3 billion in consumer sales and services, and state taxes and licensing, of which \$713 million is attributed to the retail sale of 612,000 new motorcycles.

1978 PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

State	(1)	(1) Public Land Acreage			(2)	(3)	(4)	Off-Hwy MC Penetration	
	Total Acreage	Fed Gov't	State Gov't	% of State	1978 Sales of New Mcs Used Off-Hwy at Some Time	Total Mcs Used Off-Hwy at Some Time	1978 Est. Annual Economic Value of Off-Hwy Retail Marketplace	Off-Hwy Mcs Per 100 Pop	Off-Hwy Mcs Per 1000 Public Acres
	(000)	(000)	(000)				(\$ 000)		
AL	32,678	1,129	45	3.6	11,364	88,900	\$ 46,523	2.4	75.7
AK	365,482	330,847	1,394	90.9	3,179	21,000	12,471	5.0	.1
AZ	72,688	32,118	25	44.2	9,573	66,900	46,820	2.9	2.1
AR	33,599	3,324	28	10.0	7,903	58,700	30,700	2.7	17.5
CA	100,207	46,228	843	47.0	77,416	573,100	399,240	2.6	12.2
CO	66,486	23,649	159	35.8	10,986	80,200	60,183	3.0	3.4
CT	3,135	9	191	6.4	4,966	38,200	29,099	1.2	191.0
DE	1,266	41	7	3.8	1,070	10,400	5,081	1.8	216.7
D.C.	39	12	N/A	N/A	45	1,800	662	.3	150.0
FL	34,721	3,612	283	11.2	19,087	155,500	95,238	1.8	39.9
GA	37,295	2,231	47	6.1	16,544	127,700	69,313	2.5	56.1
HI	4,106	408	18	10.4	N/A	N/A	N/A	N/A	N/A
ID	52,933	33,722	29	63.8	6,855	44,100	31,621	5.1	58.7
IL	35,795	565	287	2.4	24,189	184,500	131,436	1.6	216.6
IN	23,158	494	66	2.4	18,318	135,800	94,040	2.5	242.5
IA	35,861	225	47	.8	15,437	104,200	70,470	3.6	383.1
KS	52,511	728	24	1.4	6,986	65,000	35,602	2.8	86.4
KY	25,512	1,388	41	5.6	10,265	68,300	43,498	1.9	47.8
LA	28,868	1,075	24	3.8	19,554	107,600	77,584	2.7	97.9
ME	19,848	134	N/A	N/A	3,015	21,900	15,536	2.0	163.4
MD	6,319	205	62	4.2	6,953	59,900	36,733	1.4	224.3
MA	5,035	83	235	6.3	6,385	57,400	37,612	1.0	180.5
MI	36,492	3,436	224	10.0	25,338	234,000	130,372	2.6	63.9
MN	51,206	3,403	175	7.0	13,406	102,100	70,269	2.5	28.5
MS	30,223	1,681	17	5.0	8,575	52,500	32,817	2.2	30.9
MO	44,248	2,182	79	5.1	12,150	101,800	59,035	2.1	45.0
MT	93,271	27,628	35	29.7	5,878	42,200	27,415	5.4	1.5
NE	49,032	700	113	1.7	6,980	53,600	35,158	3.4	65.9
NV	70,264	61,560	114	87.8	3,520	21,800	18,218	3.4	.4
NH	5,769	711	105	14.1	2,843	23,700	16,888	2.8	29.0
NJ	4,813	130	253	8.0	9,805	80,800	53,140	1.1	211.0
NM	77,766	26,038	164	33.7	5,795	34,300	28,210	2.8	1.3
NY	30,681	247	2,978	10.5	20,097	146,800	118,210	.8	45.5
NC	31,403	2,034	69	6.7	11,831	121,400	56,043	2.2	57.7
ND	44,453	2,374	14	5.4	3,988	27,600	18,284	4.2	11.6
OH	26,222	341	204	2.1	24,112	195,400	131,295	1.8	50.6
OK	44,088	1,570	90	3.8	12,612	84,800	57,806	3.0	51.1
OR	61,599	32,316	90	52.6	11,848	95,800	54,056	4.0	3.0
PA	28,804	677	296	3.4	22,197	199,900	114,251	1.7	205.5
RI	677	8	12	3.0	1,749	13,000	9,386	1.4	650.0
SC	19,374	1,132	63	6.2	5,171	47,000	20,674	1.6	39.3
SD	48,882	3,365	90	7.1	3,613	25,400	16,940	3.6	7.4
TN	26,728	1,804	116	7.2	15,724	125,600	67,312	2.9	65.4
TX	168,218	3,293	102	2.0	41,413	290,600	191,303	2.3	85.6
UT	52,697	34,316	56	65.2	9,071	61,100	42,951	4.8	1.8
VT	5,936	288	35	5.4	1,397	11,000	7,271	2.3	34.1
VA	25,496	2,357	48	9.4	9,782	90,100	47,954	1.8	37.5
WA	42,694	12,421	79	29.3	19,284	145,100	95,095	3.9	11.6
WV	15,411	1,084	66	7.5	6,421	59,400	27,013	3.2	51.7
WI	35,011	1,859	108	5.6	14,444	100,400	76,832	2.1	51.0
WY	62,343	30,327	157	48.9	3,464	20,600	16,269	5.0	.7
Total U.S.	2,271,343	741,509	9,837	33.1	612,598	4,678,900	\$3,009,929	2.1	6.2

- Source: (1) Statistical Abstract of the United States 1978, U.S. Department of Commerce, Bureau of Census.
 (2) Derived from MIC Manufacturers Statistical Reporting System, 1978 Annual Report.
 (3) 1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Newport Beach, CA.
 (4) Derived from "Economic Value of the Motorcycle Retail Marketplace", Page 9, 1979 Motorcycle Statistical Annual, Motorcycle Industry Council, Newport Beach, CA. Includes retail sales of motorcycles (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registrations fees.

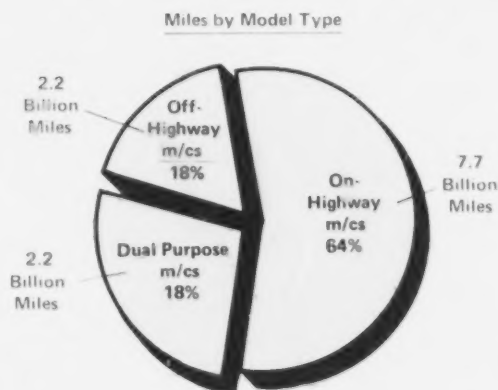
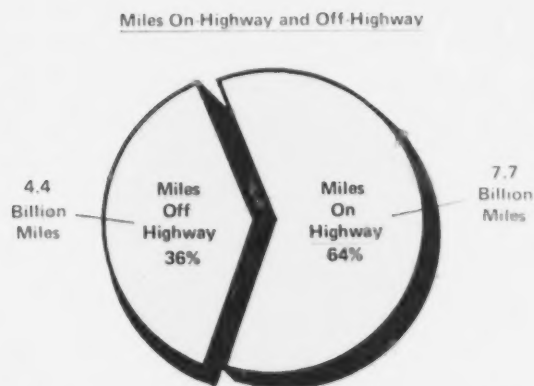
MOTORCYCLE MILES TRAVELED ON AND OFF-HIGHWAY, MILEAGE By MODEL TYPE

It is estimated that the 7.3 million motorcycles in use traveled roughly 12 billion miles (including miles traveled off-highway), compared to an estimated 1,504 billion miles traveled by all other motor vehicles in 1978.

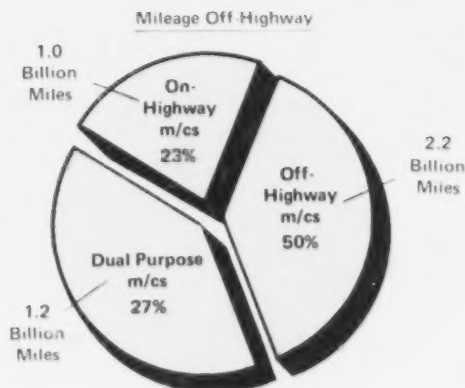
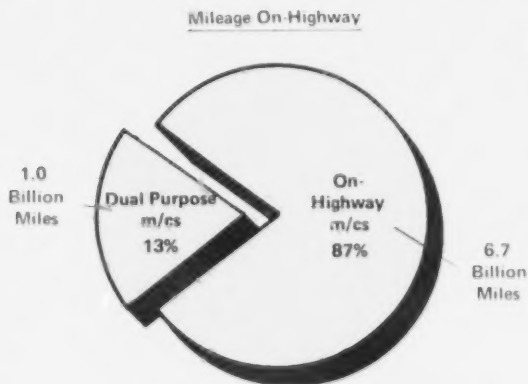
About two thirds (64%) of the total motorcycle mileage in 1978 was on public highways and the remaining third (36%) was off-highway. On-highway motorcycles accounted for the majority (64%) of motorcycle travel, while travel by dual purpose and off-highway motorcycles represented 18% each.

The majority (87%) of motorcycle mileage on public roads was accumulated by on-highway motorcycles, while only 13% of the mileage was traveled by dual purpose motorcycles. Off-highway motorcycles accumulated one half of the miles traveled off-highway, and the remaining half was divided between dual purpose motorcycles with 27%, and on-highway motorcycles with 23%.

12.1 BILLION MOTORCYCLE MILES TRAVELED IN 1978



ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE



Source: Derived by the Motorcycle Industry Council from the following sources:

1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

Analysis of mileage data from Gallup Organization Survey of Motorcycle Ownership, Usage and Maintenance by Human Factors Research, Inc., Van Nuys, CA., January 1976.

Survey of Motorcycle Ownership, Usage and Maintenance, conducted for the Motorcycle Industry Council by the Gallup Organization, Princeton, New Jersey, January 1975.

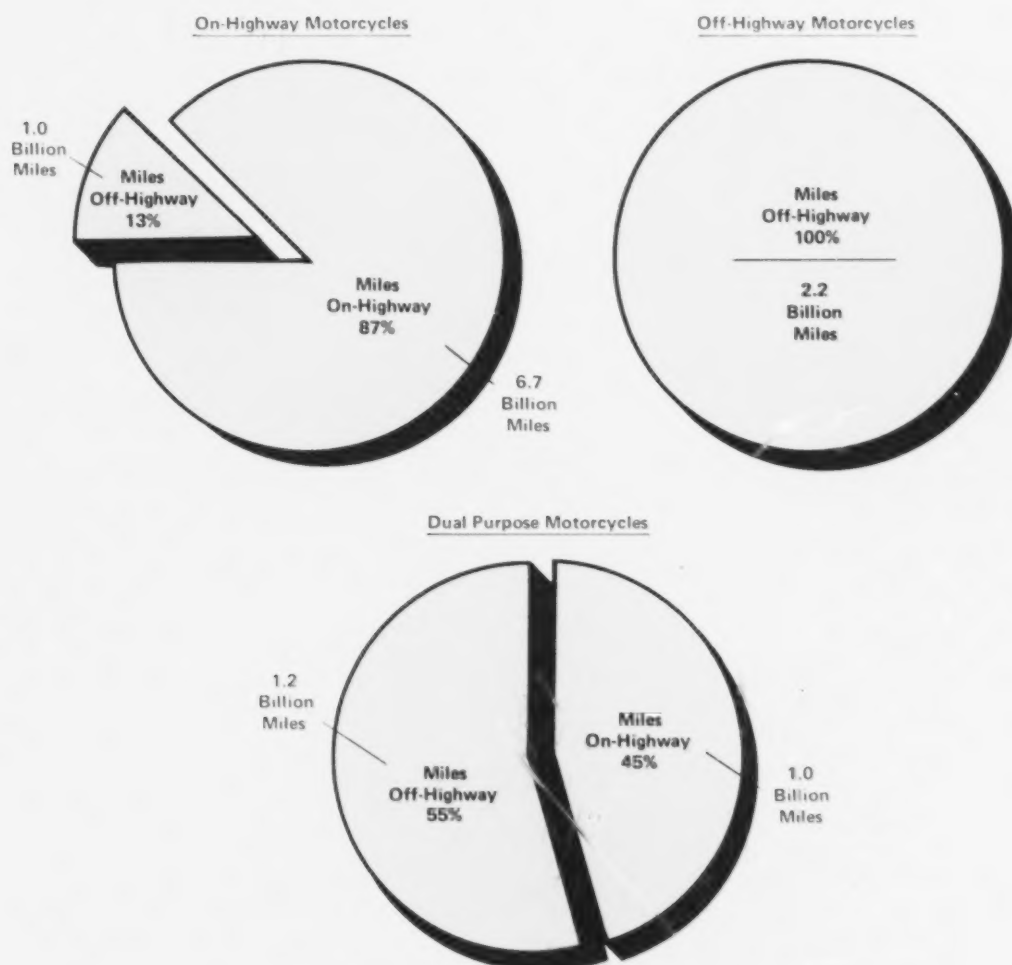
MOTORCYCLE MILES TRAVELED, MODEL TYPE By ON AND OFF- HIGHWAY MILEAGE

Based on owner estimates of the miles ridden on-highway compared to off-highway, it is estimated that 87% of the mileage accumulated by on-highway motorcycles is on public roads and the remaining 13% is off public roads.

It is assumed that all of the mileage by off-highway motorcycles is off public roads since these motorcycles do not comply with the Federal Motor Vehicle Safety Standards for use on public roads.

Mileage by dual purpose motorcycles is divided almost evenly, with off-highway mileage (55%) slightly greater than on-highway mileage (45%).

ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE



SOURCE

Derived by the Motorcycle Industry Council from the following sources:

1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

Analysis of mileage data from Gallup Organization Survey of Motorcycle Ownership, Usage and Maintenance by Human Factors Research, Inc., Van Nuys, CA, January 1976.

Survey of Motorcycle Ownership, Usage and Maintenance, conducted for the Motorcycle Industry Council by the Gallup Organization, Princeton, New Jersey, January 1975.

AVERAGE ANNUAL MOTORCYCLE MILEAGE

The average annual mileage of the motorcycle is distinct from that of the automobile because of the relatively short useful life and the pronounced decreases in annual mileage as the age of the motorcycle increases. Two concepts of average annual mileage, defined as "momentary miles per year" and "accumulated miles per year," are applicable to motorcycles, each with its appropriate uses (see explanation below).

In 1978 the values for "momentary miles per year" and "accumulated miles per year" are estimated to be 1,657 and 2,367 miles, respectively, for all motorcycles in use. On-highway motorcycles tend to be ridden about twice the annual mileage traveled on off-highway and dual purpose motorcycles. During recent years, the momentary miles per year for dual purpose motorcycles has been unusually low due to the declining volume of dual purpose motorcycle sales.

1978 AVERAGE ANNUAL MILEAGE

1978 Average Annual Mileage	Total Motorcycles	On-Highway Motorcycles	Off-Highway Motorcycles	Dual Purpose Motorcycles
1978 Momentary Miles Per Year	1,657	2,319	1,223	1,008
1978 Accumulated Miles Per Year	2,367	3,272	1,591	1,686

TWO CONCEPTS OF AVERAGE ANNUAL MOTORCYCLE MILEAGE

The more familiar concept of average mileage describes the average mileage over the entire life span of the vehicle (total miles traveled ÷ age of vehicle, see Column B below). This may be defined as the "accumulated miles per year" because it is the annual average of all mileage accumulated on the vehicle. This concept should be used when determining the average mileage accumulated per year over the vehicle life for a particular vehicle or group of vehicles, for such purposes as calculating the operation costs on an annual basis. Average annual mileage in this sense should be used with caution, however, because the older the vehicle becomes, the greater the discrepancies among actual mileages due to progressive decreases in mileage traveled each year.

The second concept of average annual mileage is important when considering the average mileage of a motorcycle or group of motorcycles in a particular year and, for clarity, may be termed "momentary miles per year" (see Column A). In this instance, average annual mileage is not dependent on the mileage accumulated over previous years, but is dependent on the mileage accumulated in a particular year according to the vehicle age and the concept that annual mileage decreases as the motorcycle becomes older. This is important, for example, when determining, for a given year or period of time, the total mileage traveled by all motorcycles (see page 31) or the contributions of motorcycle emissions.

The chart illustrates the differences between "accumulated miles per year" and "momentary miles per year" for five motorcycles, representing model years 1974 through 1978, in 1978. Generally, the value of momentary miles per year is about 30-40% less than that of accumulated miles per year. This difference exists because the majority of mileage accumulated on a motorcycle over the vehicle life is accumulated during the first and second years of use, and the majority of motorcycles in use in a given year are older than two or three years old. Thus the majority of motorcycles in use in a given year are actually traveling less than the average of miles accumulated over the current vehicle life, and therefore, momentary miles per year is less than accumulated miles per year.

TWO CONCEPTS OF AVERAGE ANNUAL MILEAGE²

Theoretical Sample of 5 Motorcycles

Calendar Year	Annual Mileage by Year					Accumulated Mileage	
	1974	1975	1976	1977	1978	Total	Average
Model Year							
1974	3400	2500	2000	1500	1000	10,400	2080
1975		3400	2500	2000	1500	8,400	2350
1976			3400	2500	2000	7,900	2630
1977				3400	2500	5,900	2950
1978					3400	3,400	3400
Total Miles					10,400		13,410
Average Annual Miles (÷ 5)					2080		2682
					COLUMN A Momentary Miles per Year	COLUMN B Accumulated Miles per Year	

Average annual mileage is not only dependent upon the model type and the age of the motorcycle, but also on engine displacement and the geographical area in which it is used. Generally speaking, the greater the engine displacement and the warmer the climate, the greater the average annual mileage becomes.

Source: ¹ Derived by the Motorcycle Industry Council from the following sources:

1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA

Analysis of mileage data from Gallup Organization Survey of Motorcycle Ownership, Usage and Maintenance by Human Factors Research, Inc., Van Nuys, CA, January 1976.

² Yamaha's Comment on Emission Control Plan for New Motorcycles, Submitted to California Air Resources Board by Yamaha Motor Co., Ltd., Japan, April 1975.

MOTORCYCLE SCRAPPAGE AND OPERABILITY RATE

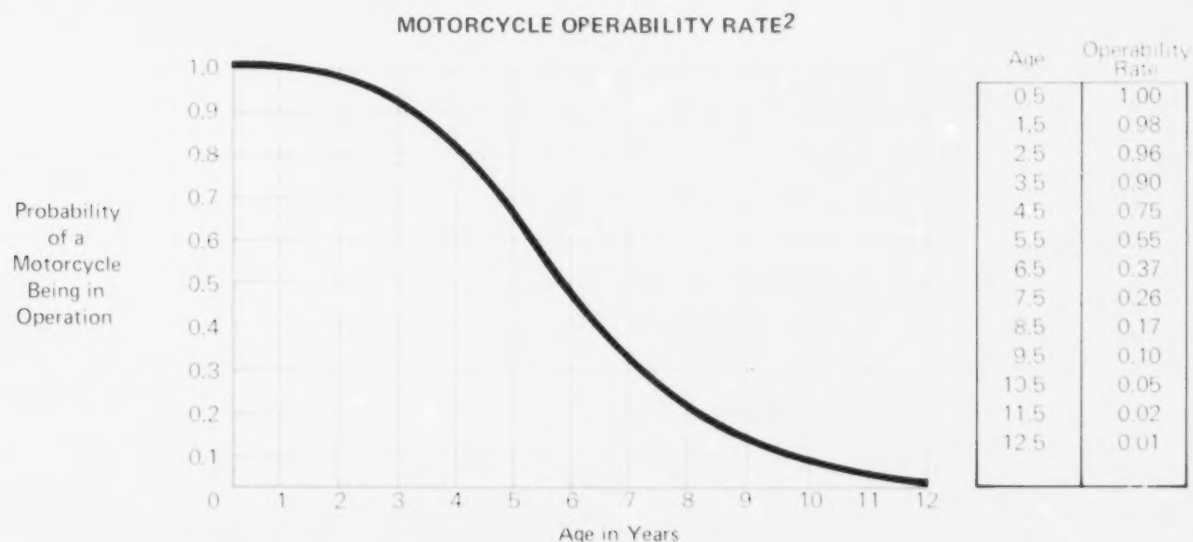
The number of motorcycles retired from use, or scrapped, in 1978 is estimated to be 1.7 million or 21.9% of the 1978 motorcycle population in use. The percentage of motorcycles retired from use annually from 1975-1978 was considerably higher than in previous years due to the low volume of new motorcycle sales during 1975-1978. Also, the motorcycles sold during the years of peak sales (1971-1973) were five to seven years old in 1978, and were therefore retired at a higher rate than in the past few years.

A key factor in determining average annual mileage is the motorcycle operability rate, the probability of a motorcycle being operable after a given number of years. This is particularly important when determining momentary miles per year because of the decrease in annual mileage as the vehicle ages. It is estimated that only 3 in every 4 motorcycles are operable after 4.5 years and the median operable life of a motorcycle is about 6 years.

MOTORCYCLES RETIRED FROM USE OR SCRAPPED IN 1978

Year Sold New	Est. ¹ Retail Sales (000's)	Operability ² Rate		Estimated ¹ Population In Use (000's)		Estimated Number Retired From Use or Scrapped In 1978 (000's)
		'77	'78	Revised '77	'78	
1978	975		100%		975	0
1977	1,080	100%	98%	1,080	1,058	22
1976	1,053	98%	96%	1,029	1,008	21
1975	940	96%	90%	902	846	56
1974	1,200	90%	75%	1,080	900	180
1973	1,520	75%	55%	1,140	836	304
1972	1,360	55%	37%	748	503	245
1971	1,240	37%	26%	459	322	137
1970	1,010	26%	17%	263	172	228
1969	670	17%	10%	114	67	50
Before 1969				1,111	618	493
				7,926	7,305	1,736 — 21.9% of 1977 Motorcycle Population

MOTORCYCLE OPERABILITY RATE



Source: ¹1978 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Newport Beach, CA.

²Yamaha's Comment on Emission Control Plan for New Motorcycles, Submitted to California Air Resources Board by Yamaha Motor Co., Ltd., Japan, April 1975.

OPERATING AND OWNERSHIP COSTS OF THE MOTORCYCLE AND AUTOMOBILE

The estimated annual costs of operating and owning a motorcycle (\$695) in 1978 were substantially less than that for an intermediate size automobile (\$2,394).

This difference is particularly apparent when considering the annual operating costs which are estimated to be almost five times greater for an intermediate size automobile (\$879) than for the average street motorcycle (\$187).

Ownership costs are estimated to be about 3 times greater for an intermediate automobile (\$1,515) than for the average street motorcycle (\$508).

1978 ANNUAL OPERATING AND OWNERSHIP COSTS AUTOMOBILE VS. MOTORCYCLE

	Intermediate Automobile (3200 lb.)	Motorcycle (500-650 cc Street)
<u>Operating Costs</u>		
Gasoline & Oil	\$ 617	\$ 52
Maintenance	165	100
Tires	97	35
<u>Ownership Costs</u>		
Depreciation	\$ 942	\$200
Insurance	483	300
Registration, Titling	90	8
Total Annual Cost	\$2,394	\$695

MOTORCYCLE USAGE

Source for automotive costs (Chevrolet, 8-cylinder Malibu Classic driven 15,000 miles per year): Your Driving Costs, 1979 edition, American Automobile Association, Falls Church, Virginia 22042.

Source for motorcycle costs (500-650 cc street motorcycle averaging 3,200 miles per year):

Gasoline: based on 50 MPG at 72.6¢ per gallon.

Maintenance and Tires: various industry sources.

Depreciation: N.A.D.A. Motorcycle Appraisal Guide, January-April 1979, National Automobile Dealers Assn.

Insurance: based on a survey of a sample of companies. Includes coverage for comprehensive, collision, and property damage and liability.

Registration & Titling: Report on Operating Costs for Privately Owned Motorcycles (Draft), General Services Administration, 1977.

MOTORCYCLE ACCIDENT STATISTICS By STATE

While motorcycle registrations have dramatically increased by 111% in the last ten years, 1969 to 1978, the number of fatalities per 10,000 motorcycle registrations has increased by 18% and the number of reported accidents per 10,000 registrations has increased by 13%. Within the same ten year period, the number of motorcycle fatalities per 100 accidents increased by only 4%.

Based on numerous and sometimes confusing criteria, the Motorcycle Safety Foundation, in cooperation with the American Motorcyclist Association, has compiled the following national and state motorcycle accident statistics for 1978.

1978 MOTORCYCLE ACCIDENT STATISTICS

	Registrations	Reported Accidents	Accidents Per 10,000 Registrations	Fatalities	Fatalities Per 10,000 Registrations	Fatalities Per 100 Accidents
<i>National</i>						
1969	2,300,893	69,553	302.29	1,855	8.06	2.67
1974	4,917,100	152,679	310.51	3,458	7.03	2.27
1978*	4,845,701	165,902	342.37	4,624	9.54	2.79
<i>State Data - 1978</i>						
Alabama (4,13,15,20)	66,756	2,897	433.97	64	9.59	2.21
Alaska (1,12,15,20)	12,736	338	265.39	18	14.13	5.33
Arizona (5,6,11,20)	68,359	3,787	553.99	88	12.87	2.35
Arkansas	34,000*	1,600*	471.18	28*	8.24	1.87
California (13,15,20)	655,950	29,978	457.02	784	11.95	2.62
Colorado (13,16,20)	110,000*	2,489	226.27	65	5.91	2.61
Connecticut (3,12,15,20)	66,201*	2,584*	390.33	77	11.63	2.98
Delaware (10,15,21)	8,550	292	341.52	8	9.36	2.74
District of Columbia (5,13,15,19)	4,161	381	915.65	5	12.02	1.31
Florida (5,7,14,20)	157,942	9,346	591.74	215	13.61	2.30
Georgia (1,6,15,19)	76,479	3,130	409.26	92	12.03	2.94
Hawaii (3,11,15,20)	9,771	619	633.51	23	23.54	3.72
Idaho (1,10,16,20)	46,566	820	176.09	25	5.37	3.05
Illinois (1,10,15,20)	249,317	8,557	343.22	230	9.23	2.69
Indiana (9,15,20)	143,357	5,130	357.85	142	9.91	2.77
Iowa (1,10,15,20)	174,548	2,516	144.14	75	4.30	2.98
Kansas (11,15,20)	81,944	2,080	253.83	53	6.47	2.55
Kentucky (1,9,15,20)	60,985	1,812	297.12	57	9.35	3.15
Louisiana (1,13,16,20)	68,000	3,666	539.12	110	16.18	3.00
Maine (5,9,15,20)	31,163	1,049	336.62	26	8.34	2.48
Maryland (5,13,15,20)	66,996	3,887	580.18	72	10.75	1.85
Massachusetts (1,6,15,20)	83,846	3,493*	416.60	91	10.85	2.61
Michigan (1,9,15,20)	242,706	6,962	286.85	160	6.59	2.30
Minnesota (5,11,15,20)	151,016	2,827	187.20	106	7.02	3.75
Mississippi (1,7,15,20)	29,596	658	222.33	37	12.50	5.62
Missouri (1,2,4,13,15,20)	112,898	2,839	251.47	67	5.94	2.36
Montana (1,7,15,20)	54,592	545	99.83	23	4.21	4.22
Nebraska (1,4,10,15,20)	49,871	1,416	283.93	33	6.62	2.33
Nevada (3,6,15,20)	20,665	976	472.30	31	15.00	3.18
New Hampshire (1,11,15,20)	39,348	698*	177.39	27	6.86	3.87
New Jersey (9,15,20)	88,008	3,941	447.80	80	9.09	2.03
New Mexico (1,4,13,15,19)	42,557	1,757	412.86	47	11.04	2.68
New York (2,12,15,20)	153,951	8,550	555.37	187	12.15	2.19
North Carolina (9,15,20)	96,697	2,838	293.49	87	9.00	3.07
North Dakota (9,15,20)	27,035	339	125.39	10	3.70	2.95
Ohio (8,15,20)	245,844*	8,186	332.98	217	8.83	2.65
Oklahoma (6,16,20)	113,902	2,065	181.30	74	6.50	3.58
Oregon (9,15,20)	91,568	1,295	141.43	70	7.65	5.41
Pennsylvania (1,14,15,20)	182,524	5,082	278.43	175	9.59	3.44
Rhode Island	18,600	560*	301.08	16	8.60	2.86
South Carolina (9,15,20)	35,280	1,582	448.41	38	10.77	2.40
South Dakota (4,12,15,20)	27,590	523	189.56	14	5.07	2.68
Tennessee (2,9,15,20)	82,454	2,693	326.61	73	8.85	2.71
Texas (1,10,15,20)	212,990	9,984	468.75	321	15.07	3.22
Utah (1,2,4,12,15,20)	52,360	1,104	210.85	26	4.97	2.26
Vermont (1,7,20)	17,394	436	250.66	14	8.05	3.21
Virginia (5,10,15,20)	64,226	2,812	437.83	76	11.83	2.70
Washington (1,2,4,11,15,19)	106,103	3,282	309.32	115	10.84	3.50
West Virginia (5,10,15,17,20)	47,124	440	199.47	29	6.15	3.09
Wisconsin (1,2,4,5,9,15,20)	143,322	3,817	266.32	112	7.82	2.93
Wyoming (4,10,16,20)	17,853	337	188.76	11	6.16	3.26

* Estimates

Footnotes

Registrations

1. Includes all persons 16 years of age and over.
2. Includes both licensed and unlicensed persons.
3. Includes those who are licensed but do not own a motorcycle.
4. Includes those who are licensed but do not own a motorcycle.
5. Includes those who are licensed but do not own a motorcycle.

6. Includes all persons 16 years of age and over.
7. Includes all persons 16 years of age and over.
8. Includes all persons 16 years of age and over.
9. Includes all persons 16 years of age and over.
10. Includes all persons 16 years of age and over.
11. Includes all persons 16 years of age and over.
12. Includes all persons 16 years of age and over.
13. Includes all persons 16 years of age and over.
14. Includes all persons 16 years of age and over.
15. Includes all persons 16 years of age and over.

16. Includes all persons 16 years of age and over.
17. Includes all persons 16 years of age and over.
18. Includes all persons 16 years of age and over.
19. Includes all persons 16 years of age and over.
20. Includes all persons 16 years of age and over.
21. Includes all persons 16 years of age and over.
22. Includes all persons 16 years of age and over.
23. Includes all persons 16 years of age and over.
24. Includes all persons 16 years of age and over.
25. Includes all persons 16 years of age and over.

26. Includes all persons 16 years of age and over.
27. Includes all persons 16 years of age and over.
28. Includes all persons 16 years of age and over.
29. Includes all persons 16 years of age and over.
30. Includes all persons 16 years of age and over.
31. Includes all persons 16 years of age and over.
32. Includes all persons 16 years of age and over.
33. Includes all persons 16 years of age and over.
34. Includes all persons 16 years of age and over.
35. Includes all persons 16 years of age and over.

Source: Cycle Safety Info, Motorcycle Safety Foundation, Linthicum, Maryland, 1979. Compiled by Motorcycle Safety Foundation and American Motorcyclist Association.

MOTORCYCLE RIDER EDUCATION PROGRAMS

It has become apparent in recent years that rider education and training are important steps in motorcycle accident prevention. Motorcycle accident statistics indicate that a substantial percentage of such accidents involve riders with limited experience.

Prior to 1973 there were few organized education and training programs to instruct beginners in safe motorcycle operation. Since 1973, the Motorcycle Safety Foundation (MSF), a private nonprofit traffic safety organization, has been successful in developing a motorcycle rider education program which includes instructor preparation and classroom and on-cycle rider instruction and is available to public, as well as private, schools and organizations.

MOTORCYCLE SAFETY FOUNDATION RIDER EDUCATION PROGRAMS

The Motorcycle Safety Foundation's rider education program curriculum, known as the *Motorcycle Rider Course* (MRC), is research-based and field-tested, and offers the latest in teaching techniques and instructional guidelines, as well as providing a complete set of educational materials. Introduced late in 1976, by the close of 1978 the MRC was in use in over 350 school and community motorcycle rider education programs in 49 states.

Qualified instructors play an important part in the implementation and success of a rider education course. In a cooperative endeavor with colleges and universities nationwide, MSF has assisted in the preparation of almost 6,000 instructors during 1973-1978. Each instructor completes a minimum of 50 hours instruction which includes performance evaluation both as a teacher and a motorcycle rider.

Motorcycle manufacturers and distributors cooperate by making motorcycles available for student use in the MRC training programs. Nearly 3,000 motorcycles were loaned free of charge to qualifying school and community programs in 1978.

Through these combined efforts increasing numbers of schools and communities are, for the first time, providing beginning motorcyclists with the opportunity to learn to ride safely. Courses meeting MSF standards (including a minimum of 22 hours of instruction both in the classroom and on-cycle) have prepared about 80,000 students since the program originated in 1973.

Many such courses are now supported, in part, with state or federal highway safety funds. The Foundation's goal is to continue this quality rider education effort for the benefit of the motorcycle riding public.

Instructor Preparation

46 colleges and universities prepared instructors with MSF assistance in 1978

5,851 instructors have been prepared with MSF assistance since 1973

Rider Education Programs

Over 80,000 students have completed courses meeting MSF standards since 1973

Over 350 schools and communities offered quality rider education courses in 1978

The MSF rider education program has been implemented in 49 states

STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

Program efforts and improvements in licensing as well as education are needed to help reduce motorcycle accidents, deaths and injuries. The Motorcycle Safety Foundation has aided in this effort through research (i.e., development of improved motorcycle operator licensing examinations) and the training of state licensing personnel.

Current licensing requirements and procedures by state, as of December 1978, are outlined below. Nearly all states require a special motorcycle license or endorsement for all individuals regardless of age, have a special knowledge test for motorcycle operators, and inspect the motorcycle or check for a valid inspection sticker. The minimum age for obtaining a motorcycle license ranges from 14 to 17.

STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES, DECEMBER 1978

MOTORCYCLE USAGE

STATE	SPECIAL LICENSE OR ENDORSEMENT	LEARNER'S PERMIT	EXPIRATION OF LICENSE	MINIMUM AGE WITH LIMITED EDUCATION	MINIMUM AGE WITH FULL EDUCATION	MOTORCYCLE SAFETY EDUCATION COURSE REQUIRED	MOTORCYCLE KNOWLEDGE TEST	OFF-ROAD SKILL TEST	ON-ROAD SKILL TEST	VEHICLE INSPECTED	BIKE OR BUMP REQUIRED	INSPECTION STICKER REQUIRED	ENDORSEMENT	Knowledge	Off-Road	Type
Alabama	•	• 10	5	14, 16 ¹⁰	14, 16 ¹⁰	•	•	•	•	•	5	•	•	•	•	
Alaska	•	•	3	16	16	•	•	•	•	•	•	•	•	•	•	
Arizona	•	• 1	2	14 ¹	16	•	•	•	•	•	4	•	•	•	•	
Arkansas	•	• 1	2	16	16	•	•	•	•	•	•	•	•	•	•	
California	•	• 1	3	16	16	•	•	•	•	•	•	•	•	•	•	
Colorado	•	• 1	2, 4	16	16	•	•	•	•	•	•	•	•	•	•	
Connecticut	•	• 1	3	16	16	•	•	•	•	•	•	•	•	•	•	
Delaware	•	• 1	4	16	16	•	•	•	•	•	•	•	•	•	•	
D.C.	•	• 1	4	16	16	•	•	•	•	•	•	•	•	•	•	
Florida	•	• 7	4	16	16	•	•	•	•	•	•	•	•	•	•	
Georgia	•	• 7	4	16	16	•	•	•	•	•	•	•	•	•	•	
Hawaii	•	• 4	2, 4	15	15	•	•	•	•	•	•	•	•	•	•	
Idaho	•	• 9	3	16 ⁹	16	•	•	•	•	•	9 ²⁵	•	•	•	•	
Illinois	•	• 9	3	16 ⁹	16 yr	•	•	•	•	•	•	•	•	•	•	
Indiana	•	•	2, 4	16	16 mo	•	•	•	•	•	•	•	•	•	•	
Iowa	•	•	2, 4	16	16	•	•	•	•	•	•	•	•	•	•	
Kansas	•	• 7	4	14	14 ¹⁸	•	•	•	•	•	•	•	•	•	•	
Kentucky	•	• 3	2	16	16	•	•	•	•	•	•	•	•	•	•	
Louisiana	•	•	2	15	15	•	•	•	•	•	•	•	•	•	•	
Maine	•	• 5	2	16	17	• ¹²	•	•	•	•	•	•	•	•	•	
Maryland	•	• 4	16	16	17	•	•	•	•	•	•	•	•	•	•	
Massachusetts	•	• 1	4	16 ¹	17	•	•	•	•	•	•	•	•	•	•	
Michigan	•	• 6	4	16	18	•	•	•	•	•	•	•	•	•	•	
Minnesota	•	• 7	4	16	18	• ¹¹	•	•	•	•	•	•	•	•	•	
Mississippi	•	• 3	3	15	15	•	•	•	•	•	•	•	•	•	•	
Missouri	•	• 1	4	15	16	•	•	•	•	•	•	•	•	•	•	
Montana	•	• 1	4	15	16	•	•	•	•	•	•	•	•	•	•	
Nebraska	•	• 1	4	16	16	•	•	•	•	•	•	•	•	•	•	
Nevada	•	• 8	4	16	16	•	•	•	•	•	•	•	•	•	•	
New Hampshire	•	• 1	4	16	18	• ¹²	•	•	•	•	•	•	•	•	•	
New Jersey	•	• 4	2	17	17	•	•	•	•	•	•	•	•	•	•	
New Mexico	•	• 3	4	15	16	• ¹⁴	•	•	•	•	•	•	•	•	•	
New York	•	• 1	4	16	16 ¹⁴	•	•	•	•	•	•	•	•	•	•	
North Carolina	•	•	2, 4	16	18	•	•	•	•	•	•	•	•	•	•	
North Dakota	•	• 7	4	14	16	• ¹⁷	•	•	•	•	•	•	•	•	•	
Ohio	•	• 1	4	16	16	•	•	•	•	•	•	•	•	•	•	
Oklahoma	•	•	4	16	14 ¹⁶	• ²⁵	•	•	•	•	•	•	•	•	•	
Oregon	•	•	4	16	16	•	•	•	•	•	•	•	•	•	•	
Pennsylvania	•	• 3	2	16	16	•	•	•	•	•	•	•	•	•	•	
Rhode Island	•	• 4	2	16	18	• ¹⁷	•	•	•	•	•	•	•	•	•	
South Carolina	•	• 7	4	15	15	•	•	•	•	•	•	•	•	•	•	
South Dakota	•	•	4	14	14	•	•	•	•	•	•	•	•	•	•	
Tennessee	•	•	2	16	16 ¹¹	•	•	•	•	•	•	•	•	•	•	
Texas	•	• 9	4	16 ¹¹	18 ¹³	•	•	•	•	•	•	•	•	•	•	
Utah	•	• 1	4	16 ¹¹	18	•	•	•	•	•	•	•	•	•	•	
Vermont	•	•	2	16	18	•	•	•	•	•	•	•	•	•	•	
Virginia	•	• 7	4	16	18	•	•	•	•	•	•	•	•	•	•	
Washington	•	• 7	2	16	18	•	•	•	•	•	•	•	•	•	•	
West Virginia	•	•	2	16	16	•	•	•	•	•	•	•	•	•	•	
Wisconsin	•	• 7	2	16	18	•	•	•	•	•	•	•	•	•	•	
Wyoming	•	• 9	3	16	16	•	•	•	•	•	•	•	•	•	•	

• Mandatory Learner's Permit Required

- Maximum 10 days
- Maximum 30 days
- Maximum 45 days
- Maximum 60 days
- Maximum 90 days
- Maximum 120 days
- Maximum 150 days
- Maximum 6 months
- Maximum 8 months
- Maximum 1 year
- Maximum 2 years
- Age 14-16 restricted to 250cc or less with parental consent
- Age 18 and above no test with declaration of 1 year of riding experience
- Learner's permit issued at age 15 or enrolled in approved course

- Off street except when facility not available
- Age 15 restricted to cycle of 5 brake horsepower knowledge test only
- Required for operating 180cc or larger
- Motorcycle only license applicants
- Provided only at select sites
- Only helmet inspected
- Helmet inspected for applicants under age 16
- Under age 18
- 14 violations, use in traffic and minimal off street test
- Motorcycle safety education required under age 18 if taught in local school
- Required for age 14-15 and motorcycle only license applicants
- Two metro sites conduct off street tests

- Under age 16
- In New York City and Nassau County must be age 17 and have completed driver education
- Effective April 1, 1978, under age 18
- Age 14-16 restricted to 5 brake horsepower or less
- Driver education required regardless of age
- Under age 17
- Age 15 restricted to 500cc or less
- Only eye protection inspected
- Age 16-17 restricted to 150cc or less
- Two classifications, one for under and one for over 150cc
- Age 14-15, restricted license to and from work and school

This information was assembled by the Motorcycle Safety Foundation Licensing and Law Enforcement Department Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.

Although this information was obtained from the most authoritative sources available as of December 1977, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

STATE MOTORCYCLE OPERATOR LICENSING STATISTICS

Based on a survey conducted by the Motorcycle Safety Foundation, the table below summarizes statistical information about the number of licensed motorcycle and other vehicle operators.

31 states reported that 5.8 million current motorcycle license endorsements have been issued. 6 states do not require a special license for motorcycle operators, and the remaining 14 states did not report or have data available.

43 states reported that a total of 6,300 state vehicle license examiners were currently employed. It was also reported that motorcycle questions were included on automobile driver license knowledge tests in 14 states.

1979 STATE MOTORCYCLE OPERATOR LICENSING STATISTICS

STATE	NO. MOTO. LICENSE TESTS	NO. MOTO. LICENSES	NO. MOTO. LICENSES	NO. MOTO. LICENSES	NO. MOTO. LICENSES	NO. MOTO. LICENSES
Alabama	NO MOTO. LICENSE TEST	2,500,000	25	NO		
Alaska	N/A	N/A	292,000	51	NO	
Arizona	N/A	33,600	N/A	69	NO	
Arkansas	70,000	N/A	1,500,000	37	NO	
California	1,343,449	200,074	74,702,400	140	NO	
Colorado	52,296	29,671	2,050,500	150	YES	
Connecticut	116,343	N/A	2,000,000	50	NO	
Delaware	22,278	3,562	395,000	12	YES	
Florida	N/A	2,500	800,000	70	NO	
Georgia	NO MOTO. LICENSE TEST	6,500,000	474	NO		
Hawaii	NR	NR	NR	NR	NR	
Hawaii (cont.)	NR	NR	NR	NR	NR	
Idaho	NO MOTO. LICENSE TEST	N/A	N/A	N/A	N/A	
Illinois	415,919	N/A	7,000,000	472	YES	
Indiana	NO MOTO. LICENSE TEST	2,200,000	N/A	107	NO	
Iowa	222,440	N/A	2,085,647	36	YES	
Kansas	N/A	N/A	2,100,000	149	NO	
Kentucky	N/A	N/A	1,128,917	74	NO	
Louisiana	774,000	N/A	2,000,000	20	NO	
Maine	46,867	N/A	672,150	33	YES	
Maryland	138,400	13,400	2,300,000	70	NO	
Massachusetts	N/A	N/A	3,600,000	200	NO	
Michigan	476,200	8,111	8,150,000	1,000	YES	
Minnesota	172,223	20,612	2,400,000	91	YES	
Mississippi	NO MOTO. LICENSE TEST	N/A	N/A	N/A	N/A	
Missouri	NR	NR	NR	NR	NR	
Montana	N/A	N/A	158,400	27	NO	
Nebraska	61,382	16,770	1,047,893	55	NO	
Nevada	N/A	N/A	474,000	90	NO	
New Hampshire	62,430	8,163	678,115	27	NO	
New Jersey	508,800	N/A	4,401,700	70	NO	
New Mexico	NR	NR	NR	NR	NR	
New York	2,400,000	N/A	8,400,000	100	NO	
North Carolina	10,188	N/A	3,490,420	257	NO	
North Dakota	21,000	2,500	472,000	40	NO	
Ohio	430,287	82,146	7,600,000	157	NO	
Oklahoma	8,200	N/A	1,800,000	70	NO	
Oregon	160,000	12,100	1,900,000	150	YES	
Pennsylvania	81,444	N/A	7,000,000	124	YES	
Rhode Island	N/A	N/A	607,248	10	NO	
South Carolina	N/A	N/A	1,437,500	4	YES	
South Dakota	2,700	364	547,000	27	NO	
Tennessee	194,274	N/A	2,611,500	4	YES	
Texas	422,708	N/A	8,836,717	343	NO	
Utah	124,720	N/A	470,000	30	YES	
Vermont	32,113	3,162	325,000	13	NO	
Virginia	138,000	67,400	2,207,600	100	NO	
Washington	155,791	15,860	2,390,047	191	NO	
West Virginia	NO MOTO. LICENSE TEST	N/A	NR	NR	NR	
Wisconsin	154,276	16,773	2,406,580	176	YES	
Wyoming	47,444	6,672	314,000	30	NO	

N/A - Responded but data not available.
NR - Information not received by 1979 deadline.
NO MOTO. LICENSE TEST - State does not have special license for motorcycle operators.
1 - Some states reported on other than standard calendar year.
2 - Where included in test results of automobile test.
3 - Motorcycle license required of 14-19 year olds only.
4 - All states in which employees authorized to administer test.
5 - Motorcycle license law effective 1-1-79.

This information was assembled by the Motorcycle Safety Foundation Licensing and Law Enforcement Department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.

Although this information was obtained from the most authoritative sources available as of December, 1978, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS

Each state governs the operation, registration, and licensing of motor vehicles. In general, motorcycles registered for use on public highways are required to meet the equipment requirements in the state in which they are registered. This is in addition to compliance with Federal Motor Vehicle Safety Standards which is required by the motorcycle manufacturers.

The most current state equipment requirements, as of January 1979, are listed below.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS, JANUARY 1979

STATE	SAFETY HELMET	EYE PROTECTION	REARVIEW MIRROR	BRAKES	HANDLEBAR HEIGHT	PASSENGER SEAT	PASSENGER FOOTRESTS	PASSENGER HANDHOLD	SAFETY BARS	PROTECTIVE CLOTHING	TURN SIGNALS	SPEEDOMETER/ ODOMETER	HEADLIGHT/ DAYTIME USE	PERIODIC INSPECTION
Alabama	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Alaska	•22	•	•	•	•13	•	•	•	•	•	•	•	•	•
Arizona	•3	•	•	•	•13	•	•	•	•	•	•	•	•	•19
Arkansas	•	•	•	•	•	•	•	•	•	•	•	•	•	•
California	•	•	•	•	•14	•	•	•	•	•	•	•	•	•21
Colorado	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Connecticut	•	•	•	•	•13	•	•	•	•	•	•	•	•	•21
Delaware	•1,m	•	•	•	•13	•	•	•	•	•	•	•	•	•
Dist. of Col.	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Florida	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Georgia	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Hawaii	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Idaho	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Illinois	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Indiana	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Iowa	•	•	•	•	•13	•	•	•	•	•	•	•	•	•20
Kansas	•4	•	•	•	•13	•	•	•	•	•	•	•	•	•21
Kentucky	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Louisiana	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Maine	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Maryland	•1	•	•	•	•13	•	•	•	•	•	•	•	•	•20
Massachusetts	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Michigan	•	•2h	•	•	•13	•	•	•	•	•	•	•	•	•21
Minnesota	•	•	•	•	•14	•	•	•	•	•	•	•	•	•21
Mississippi	•	•	•	•	•10	•	•	•	•	•	•	•	•	•
Missouri	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Montana	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Nebraska	•	•	•	•	•12	•	•	•	•	•	•	•	•	•
Nevada	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
New Hampshire	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
New Jersey	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
New Mexico	•1,3	•	•	•	•13	•	•	•	•	•	•	•	•	•21
New York	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
No. Carolina	•	•	•	•	•	•	•	•	•	•	•	•	•	•
No. Dakota	•1,3	•	•	•	•13	•	•	•	•	•	•	•	•	•21
Ohio	•	•	•	•	•13	•	•	•	•	•	•	•	•	•21
Oklahoma	•3	•	•	•	•11	•	•	•	•	•	•	•	•	•
Oregon	•3	•	•	•	•14	•	•	•	•	•	•	•	•	•21
Pennsylvania	•	•	•	•	•14	•	•	•	•	•	•	•	•	•
Rhode Island	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
So. Carolina	•1	•	•	•	•13	•	•	•	•	•	•	•	•	•
So. Dakota	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Tennessee	•	•	•	•	•11	•	•	•	•	•	•	•	•	•
Texas	•1,3	•	•	•	•13	•	•	•	•	•	•	•	•	•
Utah	•3	•	•	•	•14	•	•	•	•	•	•	•	•	•
Vermont	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Virginia	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Washington	•	•	•	•	•13	•	•	•	•	•	•	•	•	•21
W. Virginia	•	•	•	•	•13	•	•	•	•	•	•	•	•	•
Wisconsin	•22	•	•	•	•13	•	•	•	•	•	•	•	•	•21
Wyoming	•	•	•	•	•13	•	•	•	•	•	•	•	•	•

- Requirement on law
- 1 Reflectors
- 2 Where speed exceeds 35 mph
- 3 Under 18 years
- 4 Under 18 years
- 5 Left side
- 6 Left and right side
- 7 One wheel
- 8 Both wheels
- 9 Must meet performance standard
- 10 10' above faster point
- 11 12' above faster point
- 12 15' above faster point
- 13 15' above seat
- 14 Handgrip below shoulder height
- 15 Over 160 lb; if operator under 18 years

- 16 Foot pedal
- 17 Speedometer
- 18 2000rpm
- 19 Annual on-highway inspection
- 20 Upon transfer of title
- 21 Random
- 22 Under 18 years
- 23 Speedometer with both new and
- 24 Speedometer with both new and
- 25 Original equipment by manufacturer
- 26 For motorcycle manufactured after
- 27 1/1/74
- 28 For motorcycle manufactured after
- 29 1/1/80
- 30 For motorcycle manufactured after 1/1/75

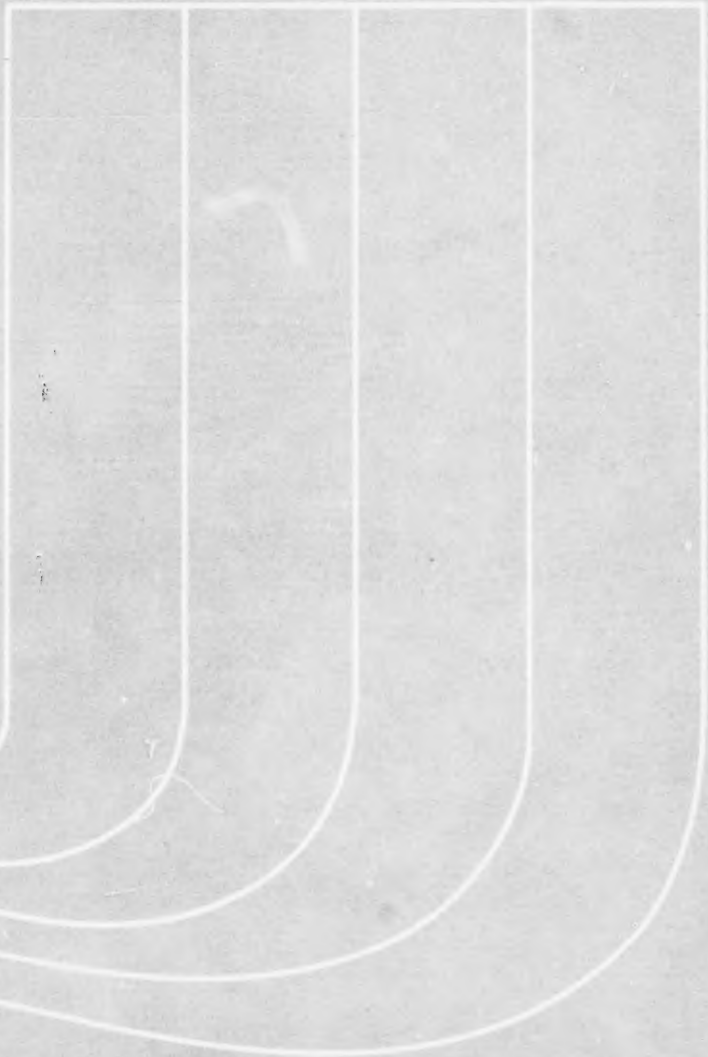
- 31 For motorcycle manufactured after
- 32 1/1/77
- 33 Not enforced
- 34 Newer models
- 35 Except if equipped with windshield
- 36 Except if equipped with windshield
- 37 15' or higher
- 38 Many state inspection regulations require
- 39 that any equipment installed on a motor
- 40 cycle must function properly even though
- 41 the equipment is not required by law
- 42 Required by inspection regulations
- 43 Denotes either of equipment since
- 44 January 1977 law was distributed
- 45 Denotes change in status since Janu-
- 46 ary 1977 law was distributed

Although this chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.



Photo Courtesy of American Honda Motor Company

THE MOTORCYCLE OWNER



NUMBER OF OWNERS AND RIDERS, OWNER'S SEX, MARITAL STATUS, AGE, EDUCATION

In 1978 it is estimated that the 7.3 million motorcycles in use were owned by 5.6 million owners and ridden by over 18 million people.

1977 consumer research indicates that about 94% of the motorcycle owners were male and 6% were female. The median owner age was 28 years with almost half (44.7%) of the owners between 18 and 29 years. High school was the highest level of education attended by about half (51.6%) of the owners, and an additional 44.5% of the owners had achieved some college or post graduate education.

MOTORCYCLE OWNER PROFILE: NUMBER OF OWNERS AND RIDERS, SEX, MARITAL STATUS, AGE, EDUCATION

5,551,000 Estimated Motorcycle Owners in 1978

18,263,000 Estimated Motorcycle Riders in 1978

Sex	% of Total Owners
Male	93.8%
Female	6.2%

Marital Status	% of Total Owners
Married	58.1%
Single	39.6%
Other/Not Stated	2.3%

Age	% of Total Owners
Under 18	12.1%
18-24	27.8%
25-29	16.9%
30-34	15.0%
35-39	8.8%
40-49	12.3%
50 and over	7.1%
Median Age	28.0 yrs.
Average Age	29.8 yrs.

Highest Level of Education	% of Total Owners
Grade School	3.9%
Attended High School	15.8%
Graduated High School	35.8%
Attended College	25.3%
College Graduate	11.8%
Post Graduate	7.4%

¹Source: The number of motorcycle owners is estimated by the Motorcycle Industry Council based on motorcycle population estimates and the distribution of motorcycles per owner. The number of motorcycle riders is estimated by the Motorcycle Industry Council based on statistics for the number of riders per motorcycle (2.5) from the Motorcycle Safety Foundation, Linthicum, Maryland.

²Source: Trendex Motorcycle Market Study, conducted for Cycle Magazine by Trendex, Inc., Westport, Connecticut, February 1978.

OWNER OCCUPATION, INCOME, CURRENT AND PREVIOUS MOTORCYCLE OWNERSHIP

Research indicates that over one third (37.4%) of the heads of motorcycle owning households in 1977 held craftsman or foreman positions, or that their job involved the operation of machinery. An additional 27.5% of the household heads were employed in professional, technical, managerial, or proprietary occupations. 15.4% held clerical, sales, or service jobs, and 6.7% were involved in farming.

The median annual income of a motorcycle owning household in 1977 was \$16,200. Over half (55.4%) of the motorcycle owners reported their total household annual income to be \$15,000 or more.

Over three fourths (77.3%) of the owners owned only one motorcycle in 1977. Less than one fourth (23.2%) of the owners reported no previous motorcycle ownership, which indicates that considerably fewer first-time buyers are entering the market than in previous years.

1977 MOTORCYCLE OWNER PROFILE: OCCUPATION, INCOME, MOTORCYCLE OWNERSHIP

THE MOTORCYCLE OWNER

¹

Occupation of Household Head	% of Total Owners
Craftsman/Foreman	23.1%
Operative	14.3%
Professional/Technical	14.2%
Manager/Official/Proprietor	13.3%
Farmer/Farm Laborer	6.7%
Clerical	5.5%
Sales Worker	5.1%
Service Worker	4.8%
Not Stated	13.0%

²

Total Household Annual Income	% of Total Owners
Under \$5,000	8.8%
\$5,000-\$7,999	7.5%
\$8,000-\$9,999	6.6%
\$10,000-\$14,999	21.7%
\$15,000-\$19,999	22.2%
\$20,000-\$24,999	13.4%
\$25,000-\$49,999	17.1%
\$50,000 and over	2.7%
Median	\$16,200
Average	\$18,928

²

Number of Motorcycles Currently Owned	% of Total Owners
Own 1 motorcycle	77.3%
Own 2 motorcycles	16.8%
Own 3 motorcycles	4.4%
Own 4 or more motorcycles	1.5%

²

Previous Motorcycle Ownership	% of Total Owners
Owled a motorcycle other than the one(s) now owned.	76.8%
No previous motorcycle ownership.	23.2%

¹Source: 1977 Survey of the U.S. Motorcycle Market, J.D. Power & Associates, Los Angeles, California, July 1977.

²Source: Trendex Motorcycle Market Study, conducted for Cycle Magazine by Trendex, Inc., Westport, Connecticut, February 1978.

INDEX

Accessories sales.	25, 26	Fatalities, traffic	36	Population, motorcycle:	
Accidents, traffic	36	Financing:		Engine displacement	4, 5
Aftermarket:		Aftermarket sales	22	Model type.	4, 5, 6
Dealer sales	25, 26	Dealer flooring	26	Off-highway	30
Dollar volume	20, 25	Motorcycle sales.	26	Penetration	.6, 30
Employees, number of	20	Imports.	10, 11	Region	.6
Financing of sales	22	Income, owner household	43	State	.6
Industries served	21	Inventory, dealer & distributor	10	Year sold.	4
Motorcycle related sales	20	Licensing procedures &		Production, U.S.	10
Products, top selling	22	statistics, state.	38, 39	Public land.	30
Retail outlets	24	Manufacturers & distributors:		Region, population by	6
Years in business	20	Aftermarket	20, 21	Registrations:	
		Motorcycle.	16, 17, 18	Brand market share	14
Age:		Mileage:		New registrations	13, 14
Motorcycle, average.	34	Average.	33	Total registrations.	7, 8
Owner	42	Model type.	31, 32, 33	Retail Outlets	21, 24
Brand market share.	14	On & off-highway.	31, 32	Retail sales:	
Dealers:		Total motorcycle	31	Dealer	25, 26
Employees, number of	25	Model Type:		New motorcycles	9, 10, 25, 26, 30
Flooring financing	26	Mileage	31, 32, 33	Parts & accessories	25, 26
Inventory	10	Population, motorcycle	4, 5, 6	Service	25, 26
Retail outlets	24	Usage on & off-highway	28	Used motorcycles	25, 26
Retail sales.	10, 25, 26	Wholesale sales	12	Scrapage/retired rate	34
Years in business	25	Motorcycle Safety Foundation	37, 38, 39	Servicing, dealer sales.	25, 26
State associations	46	Mopeds (motorized bicycles):		Sex of owner	42
Economic value:		Imports.	10, 19	State:	
Aftermarket sales	20, 25	Occupation, owner's	43	Accidents & fatalities.	36
Dealer sales	25	Operability rate	34	Equipment requirements	40
Imports.	11	Operating costs	35	Economic value of industry	9
Industry by state	9	Ownership:		Licensing.	38, 39
Off-highway industry by state.	30	Costs of ownership	35	Motorcycle penetration	.6, 30
Retail sales.	9	Motorcycle per owner	43	Motorcycle population.	.6, 30
Wholesale sales	12	Owners, characteristics of	42, 43	Public land.	30
Education:		Owners, number of	42	Registrations.	8, 13
Owner's level of	42	Previous ownership	43	Retail outlets	24
Rider training programs	37	Riders, number of.	42	Retail sales.	9
Engine displacement:		Parts sales	25, 26	Usage on & off-highway	28, 30
Imports.	11	Penetration, motorcycle	.6, 30	Wholesale sales	12
Population, motorcycle	4, 5			Usage:	
Wholesale sales	12			Commuting	29
Equipment requirements, state	40			Mileage.	31, 32, 33



MOTORCYCLE INDUSTRY COUNCIL, INC.

The Motorcycle Industry Council is a nonprofit national trade association representing manufacturers and distributors of motorcycles, motorcycle parts and accessories, and members of allied trades.

As the national, unified voice of the motorcycle industry, the MIC:

- *Develops and provides industry statistics and related information to legislators, regulatory agencies, other associations, companies, and interested individuals;*
- *Analyzes Federal and state legislative and regulatory actions, taking positive steps to promote effective law and reasonable regulations and to oppose those measures detrimental to our industry and sport;*
- *Carries out programs of research in the fields of noise abatement, motorcycle equipment safety, products liability, and land use.*
- *Promotes industry, dealer and consumer awareness directed at the reduction of motorcycle sound, the preservation of the environment, and the safe and courteous operation of all vehicles.*

Other publications and materials available on request through the MIC include:

- **Motorcycle Sound & Noise**
- **Motorcycle Sound Information Kit**
- **Federal Equipment Standards for Motorcycles**
- **Land Use Information Kit**
- **Trail Rider's Guide to the Environment**
- **"The Recreational Trailbiker," 35 mm Slide Presentation**
- **"The Trailbike Experience," 16 mm Motion Picture**
- **Moped Information Kit**
- **Products Liability Information Kit**

OTHER NATIONAL MOTORCYCLE ORGANIZATIONS



AMERICAN MOTORCYCLIST ASSOCIATION

*P.O. Box 141
Westerville, Ohio 43081
(614) 891-2425*

The AMA, which is in its 56th year, represents nearly 130,000 motorcycle enthusiasts, and membership is growing every day. Certainly no other organization can speak with such authority as to the wishes and attitudes of individual riders. The AMA sanctions over 7,000 organized motorcycle events in this country, charters over 1500 local clubs, and takes legislative action on countless issues which affect motorcycle users.



MOTORCYCLE SAFETY FOUNDATION

*780 Elkridge Landing Road
Linthicum, Maryland 21090
(301) 768-3060*

The Motorcycle Safety Foundation (MSF) was founded in 1972 to deal with the promotion of motorcycle safety and education. The MSF deals closely with governmental agencies on the Federal and state levels, as well as the education community. They have developed a number of research studies and publications on cycle safety including an impressive Motorcycle Rider Course which is available to school districts, governmental agencies and private individuals. The MSF has an on-going program of workshops to teach driver education instructors methods of motorcycle safety training. The MSF also has recently entered into an agreement with the National Highway Traffic Safety Administration to join forces in promoting motorcycle safety.

STATE MOTORCYCLE DEALERS ASSOCIATIONS

In all states but Alaska retail motorcycle dealers have formed nonprofit associations to engage in government relations and other activities for the good of the motorcycle industry in their state. The MIC recognizes and supports these state associations with several informational exchange programs. The name and address of current state dealer association officers are listed on the following pages.

INDIANA

John Greenrose
Indiana Motorcycle Dealers Assn.
907 N. Spring St.
Jeffersonville, Indiana 47130
(812) 282-8229

IOWA

Marcia Hellum
Iowa Motorcycle Dealers Assn.
Dreher, Wilson, Adams & Jensen
200 Stephens Bldg
Des Moines, Iowa 50309
(515) 288-0247

KANSAS

Carol Beggs
Kansas Motorcycle Industry Council
129 S. Fourth
Salina, Kansas 67401
(913) 827-6743

KENTUCKY

Tony Coates
Kentucky Motorcycle Dealers Assn.
1140 W. Fern Valley Rd.
Louisville, Kentucky 40219
(502) 968-0162

LOUISIANA

Frank A. Zimbelman
Louisiana Motorcycle Industry Council
501 South Bernadotte
New Orleans, Louisiana 70119
(504) 486-5946

MAINE

Eric Chinchette
Maine Motorcycle Dealers Assn.
375 Riverside Street
Portland, Maine 04103
(207) 797-3532

MARYLAND

Howard A. Triplett
Maryland Motorcycle Dealers Assn.
4121 Primrose Avenue
Baltimore, Maryland 21215
(301) 764-3294

MASSACHUSETTS

Frank Hanson
Massachusetts Motorcycle Dealers Assn.
168 Main St.
Hudson, Massachusetts 01749
(617) 562-9361

MICHIGAN

Don Craig
Michigan Motorcycle Dealers Assn.
2423 Newport Drive
Lansing, Michigan 48906
(517) 321-4351

MINNESOTA

Bob Illingworth
Minnesota Motorcycle Industry Assn.
100 West Franklin Avenue
Minneapolis, Minnesota 55404
(612) 729-7311

MISSISSIPPI

Gale Butler
Mississippi Motorcycle Dealers Assn.
P.O. Box 6604
Jackson, Mississippi 39212
(601) 372-0021

MISSOURI

Jim Moon
Missouri Motorcycle Dealers Assn.
3131 S. Campbell
Springfield, Missouri 65807
(417) 883-3632

MONTANA

Bruce Peterson
Montana Motorcycle Dealers Assn.
2900 Reserve
Missoula, Montana 59801
(406) 543-3153

NEBRASKA

Jerry Biskup
Nebraska Motorcycle Dealers Assn.
2400 N Street
Lincoln, Nebraska 68510
(402) 432-8888

NEVADA

Frederic Harrell
Motorcycle Dealers Assn. of Nevada
P.O. Box 19250
Las Vegas, Nevada 89119
(702) 871-1659

NEW HAMPSHIRE

Rupert Dance
New Hampshire Motorcycle Dealers Assn.
105 Manchester St.
Concord, New Hampshire 03301
(603) 225-2779

NEW JERSEY

Fern McInerney
Motorcycle Industry Council of N.J.
86 Morris Avenue
Springfield, New Jersey 07081
(201) 379-1100

NEW MEXICO

David Bodwell
New Mexico Motorcycle Dealers Assn.
8919 Montgomery
Albuquerque, New Mexico 87109
(505) 884-9033

NEW YORK

Donald J. Boyle
New York Motorcycle Dealers Assn.
17 Elk Street
Albany, New York 12207
(518) 449-8786

NORTH CAROLINA

Jim Smith
N.C. Motorcycle Dealers Assn.
1312 E. Bessemer Avenue
Greensboro, North Carolina 27405
(919) 274-6262

NORTH DAKOTA

Wallace Kapaun
North Dakota Motorcycle Dealers Assn.
1920 12th Avenue, North
Fargo, North Dakota 58102
(701) 235-6478

OHIO

Larry Trask
Ohio Motorcycle Dealers Assn.
84 N. High St.
Dublin, Ohio 43017
(614) 889-2314

OKLAHOMA

Bill Schramm
Oklahoma Motorcycle Dealers Assn.
7904 N.W. 10th
Oklahoma City, Oklahoma 73127
(405) 727-7901

OREGON

Ed Hughes
Oregon Motorcycle Dealers Assn.
4141 S.E. Jackson
Portland, Oregon 97222
(503) 653-9660

PENNSYLVANIA

A. Robert Thomas
Pennsylvania Motorcycle Dealers Assn.
Aster Drive, Norvelt
R.D. 1
Mt. Pleasant, Pennsylvania 15665
(412) 423-4553

RHODE ISLAND

Ralph Razez
Rhode Island Motorcycle Dealers Assn.
Box 293
N. Kingstown, Rhode Island 02852
(401) 295-8837

SOUTH CAROLINA

Ronald S. Brooks
South Carolina Motorcycle Dealers Assn.
5870 Dorchester Road
Charleston Heights, South Carolina 29405
(803) 552-2316

SOUTH DAKOTA

James D. LeMar
South Dakota Motorcycle Dealers Assn.
Box 156
Sturgis, South Dakota 57785
(605) 347-2636

TENNESSEE

William Malone
Tennessee Motorcycle Dealers Assn.
259 Tusculum
Antioch, Tennessee 37013
(615) 832-2975

TEXAS

Mike Merits
Texas Motorcycle Dealers Assn.
4302 Airport Blvd.
Austin, Texas 78722
(512) 454-8626

UTAH

Spence Adams
Utah Motorcycle Dealers Assn.
2354 S. State St.
Salt Lake City, Utah 84115
(801) 486-5401

VERMONT

Donald C. Bevins
Vermont Motorcycle Dealers Assn.
407 Barre St.
Montpelier, Vermont 05602
(802) 223-2346

VIRGINIA

Bruce Stuart
Virginia Motorcycle Dealers Assn.
10040 Midlothian Tpke.
Richmond, Virginia 23235
(804) 320-7917

WASHINGTON

James R. Tenneson
Washington Motorcycle Dealers Assn.
5908 Roosevelt Way, N.E.
Seattle, Washington 98105
(206) 524-6282

WEST VIRGINIA

Larry Young
West Virginia Motorcycle Dealers Assn.
233 Virginia Street East
Charleston, West Virginia 25301
(304) 343-4431

WISCONSIN

Jim Baxter
Wisconsin Motorcycle Dealers Assn.
6678 Pertzborn Rd., Route One
Dane, Wisconsin 53529
(608) 849-4054

WYOMING

Greg Cederburg
Wyoming Motorcycle Dealers Assn.
615 South Greeley Highway
Cheyenne, Wyoming 82001
(307) 638-8307

While this information is thought to be the most accurate available at the date of publication, the Motorcycle Industry Council assumes no responsibility for accuracy or completeness.

Additions and corrections are solicited for future publications.